The European Union's TRACECA programme
for Azerbaijan, Georgia, Kazakhstan, Turkmenistan and Ukraine

Motorways of the Sea for the Black Sea and the Caspian Sea

Project Interim Report n°1

June 2009

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Project Title	: Motorways of the Sea for the Black Sea and Caspian Sea	
Project Number	: EuropeAid/126588/C/SER/MULTI	
Beneficiary Countries	: Azerbaijan, Georgia, Kazakhstan, Turkmenistan and Ukraine	
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PROJECT SYNOPSIS

Project Title	: Motorways of the Sea for the Black Sea and the Caspian Sea
Project Number	: EuropeAid/126588/C/SER/MULTI
Countries	: Azerbaijan, Georgia, Kazakhstan, Turkmenistan and Ukraine

Project objectives:

The overall objective of the project is to facilitate trade and transport along the corridor Europe-Black Sea region- Caucasus- Central Asia through improved interoperability and multi-modal transport on the Black Sea and the Caspian Sea.

The specific objective is to promote the concept of "Motorways of the Sea" in TRACECA countries in order to support efficient intermodal freight transport connecting the Black and Caspian Seas' neighbouring countries with the enlarged EU territory.

Definition: a Motorway of the Sea (MoS) is a maritime intermodal freight transport chain.

The selection of MoS pilot projects and segments will develop specifically sea-land links (rail, road and possibly inland waterways).

Outputs:

Four main outputs will have to be achieved within the project duration:

1. Extensive review and analysis of transport systems in beneficiary countries ("pre-MoS" conditions in beneficiary countries and in other Black Sea/ Regional countries)

2. Awareness rising to promote economic potential of intermodal logistics chain (case demonstrations, exchange of best practices, training) and related recommendations.

3. Short and Medium term Road Map: Pilot projects to be identified and selected with beneficiary countries:
   - according to MoS standards and conditions
   - based on transport policies and market requirements

4. Pre-feasibility or feasibility studies for selected projects:
   - impact assessment (socio-economic, environmental, market benefits, obstacles, solutions, national and regional dimension)
   - coordination with international financing institutions
   - promotion/ communication

Project activities:

The project activities are consisting in short term and long term expertises in all MoS fields: Traffic forecasts, Financial evaluation, Transport and Port legal environment and management procedures, Port operations, Environment, Design of facilities.

Project starting date: December 2008 (signature); 23 January 2009 (kick-off)
Project duration: 24 months

Table of Content

LIST OF ACRONYMS

B2B	Business-to-business
B2C	Business-to-customers
BSBTD	Black Sea Bank for trade and Development
BSEC	Black Sea Economic Cooperation
CCC	Customs Control Committee
CIM-SMGS	Common railway bill for CIM and SMGS systems
CLECAT	European Association for Forwarding, Transport and Customs Services
DWT	Dead Weight Tonnage
EAST-MED	Eastern-Mediterranean
EBRD	European Bank for Reconstruction and Development
EC TRACECA	European Commission program "Transport Corridor Europe-Caucasus-Asis"
EDI	Electronic data interchange
EIB	European Investment Bank
EU	European Union
FDI	Foreign direct investments
FIATA	International Federation of Freight Forwarders Associations
FIZ	Free Industrial Zone
GS	General secretariat (Traceca)
IBRD	International Bank for Reconstruction and Development
IGC	Intergovernmental Committee
IRU	International Road Union
IW	Inland Waterways
KPI	Key performance indicators
LOC	Liner's own container
MLA	Multilateral agreement
MoS	Motorways of the Sea
MTC(U)	Ministry of Transport and Communications (of Ukraine)
NIB	Northern Investment Bank
NS	National Secretary
O/D	Origins and destinations

PS	Permanent Secretary
SMART_CM project	EU project “SMART Container Chain Management”
SMGS	Waybill as per Agreement on International Freight Transportation by Railways
SOC	Shipper’s own container
SWOT	Strenghts Weaknesses Opportunities Threats
TEN-T	Trans-European Transport Network
TEU	Twenty-foot equivalent unit
TORs	Terms of Reference
TREDIT	Greek company “TREDIT”
UN	United Nations
UNECE	United Nations Economic Commission for Europe
VTMIS	Vessel Traffic Management and Information System
WS	Workshop
WTO	World Trade Organisation

1 Project presentation

The project commenced in January 2009.

The main objectives of the project concern the promotion of effective and efficient intermodal freight transport solutions between the EU and the Black Sea Caucasus and Central Asia countries within the MoS framework, which implies:

- To facilitate trade and transport on the corridor
- To improve interoperability and multimodal transport on Black Sea and Caspian Sea
- To develop the concept of “Motorways of the Sea” (MoS)

A Motorway of the Sea is a maritime based intermodal freight transport chain focusing on sea-land connections (rail, road and inland waterway).

According to the ToRs, this project will have to achieve four main outputs within its two-year duration:

1. Review and analysis of transport “pre-MoS” conditions in the beneficiary countries and the other partner countries around the Black Sea: Bulgaria, Romania, Turkey

2. Awareness raising on economic and value potentials of intermodal logistics transport and related recommendations

3. Short and Medium term Road Map: Pilot projects selected with beneficiary countries

4. Pre-feasibility/ feasibility studies for selected projects

It should also focus on impact assessments (market trade developments, resolution of obstacles, socio-economic and environmental impacts), coordination with International Financing Institutions as well as promotion and communication.

This first Interim report covers the three months after the Inception phase and report of the project (April/ May/ June 2009). This report presents the status of work and the main findings at the end of this interim phase.

This Interim report is a working document prepared for the use of the Client and the Steering Group; its forms and contents are not prepared for wider publication. The report shows a more advanced method for project development as a result of the preliminary findings of early investigations.

Although some of the information produced are still at preliminary or provisional stages, it is assumed that the outputs reported here will provide some helpful feed-back, in line with the expected progress and within the timeframe, and more particularly some advanced orientations, with the exception of Turkmenistan yet, due to reported difficulties to establish the required preliminary official contacts.

1.1 Background

The TRACECA programme was launched in 1993 under a European Union (EU) funded technical assistance (TA activities) to develop the transport corridor on the West- East / East-West axis between Europe and Central Asia including Eastern through the Caucasus. This programme was further extended to Ukraine and the five Black Sea countries.

In 1998, a "Basic Multilateral Agreement (MLA) on International Transport for the Development of the Transport Corridor Europe- Caucasus-Asia", including technical annexes on rail and road transport, commercial maritime navigation, customs procedures and documentation was signed by 12 countries: Azerbaijan, Bulgaria, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Romania, Tajikistan, Turkey, Uzbekistan and Ukraine.

In March 2000, the first TRACECA Intergovernmental Commission meeting took place in Tbilisi. Two supporting structures were set up in order to facilitate the implementation of the MLA:

- An Intergovernmental Commission (IGC), ministerial committee to decide by consensus on new actions and discuss the possibilities of TRACECA-funding by the EC and,
- The Permanent Secretariat established in Baku to prepare the yearly meetings of the IGC and coordinate the activities with designated officials in the signatory states.

Countries have acknowledged the achievements reached by TRACECA and intend to fully take advantage of the programme. The number of countries expressing strong interest in TRACECA is increasing (Iran, Pakistan and Afghanistan applied to become members and Russia and Egypt applied to become observers).

Furthermore, in the context to the EU enlargement, the Ministerial Conference on Transport Cooperation between EU Black Sea- Caspian littoral states and their neighbours held in November 2004 in Baku (the "Baku initiative on Transport") was launched as a process for enhanced relations through the greater integration of transport markets

The representatives of Azerbaijan, Armenia, Belarus, Bulgaria, Georgia, Kyrgyzstan, Kazakhstan, Moldova, Romania, Tajikistan, Turkey, Ukraine and Uzbekistan agreed on the progressive integration of their respective transport networks and markets in accordance with EU and international legal and regulatory frameworks.
For this purpose, it was agreed to further develop the cooperation in the domain of transport and four Expert Working Groups identified priority orientations for transport cooperation, gradual integration of markets and sector reforms in year 2005.

In May 2006, the 5th Annual Meeting of the IGC TRACECA and the 2nd "Baku Initiative" Ministerial Conference on Transport Cooperation between EU Black Sea- Caspian littoral states and their neighbours was convened in Sofia. During the IGC TRACECA meeting, member states officially approved a long-term strategy for the TRACECA corridor up to 2015.
They confirmed their previous commitment to finance the operational cost of the TRACECA secretariat. During the 2nd "Baku Initiative" Ministerial Conference, participants endorsed the conclusions of the four Expert Working Groups (as for the development of the ports along the TRACECA corridor).

The Motorways of the Sea (MoS), defined as frequent door-to-door intermodal services relying on maritime transport for the long haul, came within this framework, with MoS pilot projects to be launched in order to mark significant progresses for intermodal maritime links between and within the regional and sub-regional markets, in consideration of the position of the Black and Caspian Seas MoS among the five transitional axes in a EC Communication dated on 2007.

The transport of freight, passengers and energy in the Black and Caspian Sea and the Caucasus areas are serviced by sea going river vessels, Ro-Ro ferries for trucks and rail ferries for railways wagons, with some ports/intermodal hubs connected to inland waterways.

These are already "sea-based transport routes" in the Black and Caspian seas, but the modal services are mostly segmented. Each part of the chain is using different transport modes and different procedures, which does not meet the MoS concept.

The particular MoS Pilot project was approved with letters of endorsement from National Secretaries of beneficiary Countries in first quarter of 2008, whereby it was confirmed that MoS should focus on improving existing or new viable maritime routes and their linking intermodal services in a "door-to-door" transport chain approach.

Note: Important decisions were taken on the above late June 2009. Full details of these decisions were not known at the time of writing this report. Their possible impacts such as new TRACECA Membership or revised guidelines will be examined as soon as they are available in the form of technical notes.

1.2 Summary of key project activities performed in April- June 2009

During the reporting period core activities of the project concentrated on the achievement of two principal results:

1. Completing the review of relevant information and studies; this work has started during the project inception phase (Task 1).

2. Launching the awareness raising activities to support MoS concept with the project beneficiary countries (Task 2).

In view of these planned results, the project activities focused during the period on:

- **Completing the field missions to beneficiary countries**. During the reporting period field missions to project beneficiary countries took place to Kazakhstan (Astana, Aktau), Azerbaijan (Baku) and Georgia (Tbilissi, Poti and Batumi);

- **Presenting MoS concept to the representatives of project beneficiary countries**. The concept of MoS was presented and discussed during a workshop in Kiev, as well as in face to face meetings in the course of the above missions and contacts

- **Widening contacts with potential project players and users**, for example when representatives of the project attended the Transport Week in Odessa and established contacts with international and national professional organisations (forwarders, custom brokers, etc.), shipping companies, forwarders and sea ports;

- **Coordinating on activities with other projects.** One inter-contracts meeting was convened by the E.C. in Brussels and coordination meetings took place in Ukraine (Kiev and Odessa, the latter at the initiative of the EU Delegation), and other contacts and exchanges have become regular.

The following is a summary of project activities is presented below:

Dates	Locality	Events	Relevance
April 27-30, 2009	KZ (Astana)	Field visit	Task 1, activity 12
May 11-17, 2009	AZ (Baku), GE (Tbilissi, Poti, Batumi)	Field visits	Task 1, activity 12; Task 2, activity 21
May 12, 2009	EU (Brussels)	Inter-contracts meeting	Task 1, activity 11
May 19-20, 2009	UA (Kiev)	MoS workshop; project coordination	Task 2, activity 20
June 02-06, 2009	KZ (Aktau)	Field visit	Task 1, activity 12; Task 2, activity 21
June 08-12, 2009	UA (Odessa)	Transport Week; project coordination	Task 2, activity 21

1.2.1 Short description of progress on key outcomes

Task 1: Extensive review and analysis of transport systems in beneficiary countries ("pre-MoS" conditions in beneficiary countries and in other Black Sea/ Regional countries):

During the reporting period three additional consultants/experts were mobilized for the project. In particular, the European Commission approved TORs for:
- Railways Infrastructure Specialists (short term experts),
- Inland waterways specialist (short-term expert),
- Local coordinator/economist (long -term expert).

The quantitative data of reports and studies was completed by qualitative findings of project experts from the field missions as listed above and analysed further in this report.

Task 2: Awareness rising to promote economic potential of intermodal logistics chain (case demonstrations, exchange of best practices, training) and related recommendations:

The project strategy for developing awareness and promotion of MoS in the beneficiary project countries consists of two principal steps:
1) establishing a common understanding and vision on the MoS concept and the perspectives of its development in the region;
2) expanding the awareness of MoS concept among the project target audience: exporters / importers and forwarding agents, transport operators, professional business organisations.

For the promotion purposes, synthetic documents have been prepared and are progressively adapted. These are describing the principles and key elements of MoS and for the implementation of pilot projects. The first versions of the documents were presented and discussed in Power Point format during the MoS project workshop of Kiev in May.
These presentations are in ANNEX.1

The MoS project invited TRACECA NSs and the representatives of transport authorities from beneficiary countries (Azerbaijan, Georgia, Kazakhstan, Turkmenistan and Ukraine) to take part in the workshop on **May 19th–20th**, 2009 in Kiev. The workshop gave an opportunity to participants and project team to exchange on the potentials of MoS development in TRACECA region, assess the existing legal/regulatory and institutional environment and the ongoing initiatives of the project beneficiary states.

Conclusions and recommendations of the Workshop are found in 2.2.1. below.

On **June 8th**, 2009, the Senior Legal Expert presented the MoS project (objectives, expected results, approach and methodology) during the International Forwarders` Day (IFD) in Odessa**.** This gave an opportunity to reach a potential project audience from various circles (forwarding and shipping companies, sea ports, and professional transport organisations) in the region and receive their feedback on the perspectives and potential barriers to MoS development The IFD event was organised within the frame of Transport Week in Odessa, which also covered the international exhibition "Inter-Transport" and the conference “Black Sea Region: transport communication environment between Europe, Asia and other continents”.

This allowed to further explore the project environment, including both “hard” (infrastructure) and “soft” (procedures) aspects, to be taken into account while elaborating the MoS pilot projects (Task 3) during the next reporting period.

1.2.2 Coordination on project activities with other projects

Recognising the importance of EU projects` coordination, during the reporting period the Project Team took part in several events:

- a TRACECA projects coordination meeting in Brussels on May 12th with the Logistics Projects and the “Transport dialogue” project which was just being launched;
- project coordination meetings in Ukraine on May 20th and May 28th (legal issues) in Kiev and on June 10th in Odessa;
- a meeting of several regional and Ukrainian projects organised by the EU delegation for Ukraine in Odessa on June 10th.

The general conclusions of these meetings are reported below and further detailed in chapter 2 for the major ones.

On **May 12th, 2009** a main conclusion of the meeting in Brussels was to build synergies among Traceca parallel projects especially with the newly starting “umbrella” Transport dialogue” project. This project will be the coordinating one, and deal with the final conclusions of the “Traffic flows and Traffic Forecasts” project (awaited at time of writing this report).

On **May 20th, 2009** using the opportunity of the MoS workshop a short de-briefing session with the representatives of EC Delegation in Ukraine, Corporate Solutions (representing TEN-T project and “Ukrainian Port Feasibility Study” project) and EC TRACECA project “International Logistics Centers in Western NIS and the Caucasus” was organised in Kiev. The EU Delegation in Kiev stated that the coordination of projects` could be improved in Ukraine, and recommended that the project coordination should not take place only at a bilateral level (between two concerned projects), but rather on a wider (strategic) level. This decision was followed by the coordination meeting held in June during the Transport Week in Odessa.

On **May 28th, 2009** a technical (legal) coordination meeting between the legal experts of two TRACECA projects "International Logistics Centers for Western NIS and the Caucasus" and "Motorways of the Sea for the Black Sea and the Caspian Sea" was organised in Kiev to exchange on the legal and regulatory framework in Ukraine: the implementation of international conventions, custom clearance and dry ports` practices. This clarified the common legal issues between both projects, as well as differences like for example land laws which is a very important subject for the "Logistic centers" project.

On **June 10th, 2009** the representatives of several EU-funded projects met in Odessa in order to update partner projects on their respective progress, and to exchange again on common problems and possible solutions. The meeting was attended by the representatives of the following projects:

- Ukraine Port Feasibility Study
- International Logistics Centers for Western NIS and the Caucasus
- Support to the Integration of Ukraine in the Trans-European Transport Network TEN-T
- Integration of Trans-European Transport network and border crossing points, Belarus-Ukraine
- Motorways of the Sea for the Black Sea and the Caspian Sea

1.3 Overall assessment of the project progress

The following table presents a general overview of the status of work at the end of the first Interim Phase: Progress (%) against actual planned.

	Progress (%)	
	Planned	Actual
Task 1 Review of studies		
Activity 1.0 Mobilisation	100	100
Activity 1.1. Review and analysis of studies	100	100
Activity 1.2. Information up-date	75	80*
Activity 1.3. Market research	50	50
Task 2. Awareness raising	0	0
Activity 2.0. Training, support for the MoS concept	15	15
Activity 2.1. Identification and contact of main stakeholders	100	85*
Activity 2.2. Partnership structuring support	10	5
Activity 2.3. Support for promotion of pilot projects	0	10
Task 3. Elaboration of a Road Map	0	0
Activity 3.0 Assistance in the design of pilot projects	0	0
Activity 3.1 Analysis of business plan	0	0
Activity 3.2 Elaboration of a road map	0	0
Task 4. Impact assessment	0	0
Activity 4.0 Pre-feasibility or feasibility studies	0	0
Activity 4.1 Impact assessment	0	0

* except Turkmenistan

2 Project awareness/ promotion

2.1 Institutional level

- **TRACECA National Secretaries, Ministries of Transport and other Ministries**

The first awareness and promotion initiatives had started during the inception phase with the preliminary presentation of MoS and Pilot projects before the TRACECA high level Executives: TRACECA Permanent Secretary and staff, TRACECA National Secretaries and Ministries of Transport of beneficiaries countries, as agreed with N.s.

This was completed in all direct beneficiary Countries shortly after the Inception phase with the exception of Turkmenistan.

A complete and update summary of these meetings is presented below.

Concerning Turkmenistan, preliminary contacts were taken and the team was prepared at the time of this report to complete both the official introductions in the capital and field visit (Turkmenbashi) as soon as this is accepted.

Concerning the associated (non direct beneficiary) countries, the discussions and exchanges between their National Secretaries or representatives and the MoS team are based on the contract ToRs. Counterparts of Bulgaria, Romania and Turkey had been informed earlier about the project (as reported in the Inception Report). It has been agreed that the best ways and means will be used to discuss the project with them, probably in wider TRACECA meetings.

Some other TRACECA countries had also enquired on the project, with the same comments.

Additionally, and in consideration of the frequent request on the possible involvement of non beneficiary Countries in MoS pilot projects, it is suggested here that relevant project on formation and documents are circulated to all Countries N.Ss. Examples of those materials, may be the existing presentations and currently under preparation (Qs and As, glossary…).

- **SUMMARY OF MEETINGS AND CONTACTS WITH TRACECA NATIONAL SECRETARIES and MoTs**

As reported in the Inception Report, all TRACECA National Secretaries (NSs) or their Counterparts of direct beneficiary Countries (except Turkmenistan) had been met:

- in the series of formal introductory meetings at their offices:
- more informally in collective events reported in the Inception Report
- during experts' field visits, as reported in this report

Additionally, National Secretaries attended or were represented at the Kiev Workshop (same exception).

In consideration of the links between NSs and Ministries of Transports, further contacts were taken with several MoTs Departments, with a special trip to Astana on 28-30 April in order to complete the introductory tour.

Note: N.Ss or counterparts of non direct beneficiary Countries who enquired on the MoS projects had been met briefly in Bucharest: Turkey, Rumania and Bulgaria (plus Moldavia and Armenia), which was followed by further phone discussions to precise the mission and possible future involvements of these Countries in MoS Pilot Projects.

The above meetings were a pre-requisite for the presentation of the MoS projects, the introduction of the experts team, and an approval of the type of contacts and field visits to be further conducted in each country (Ports, Railways, other Administrations etc.)
Depending on the dates, all series of meetings led to the expected results, which authorised to plan the more technical meetings and field visits.

The following (A) is a synthesis of the main common issues that were discussed.

Specific Country issues were also discussed (B).

A. All Countries

- **Translation of "Motorways of the Sea" (MoS)**

  When translated into Russian, the term "Motorways" raises frequent questions and different views on its meaning and possibility to use another word. The general understanding is that this (like in most languages) concern only "land road" and "road vehicles". The equivalent of "freeways" or "highways" would be more relevant. Further clarifications will be all the more necessary on each occasion.

- **Awareness and perception of MoS projects**
  These were the major issues for discussion.

  The questions and answers (Q/A) exercise that were further prepared for the Kiev Ws, meetings and information/ promotion channels were also identified by these contacts.

- **N.S. functions and role in the project**.

  Generally N.Ss offered to introduce and liaise with the relevant institutions, including with national professional associations, and other types of contacts.

  Some introductions and support in the preparation of field visits were made immediately after meetings, which were followed by an confirmation letters when and as required.

- **Markets strategy**

  All Countries are concerned by:
  - two types of market trade and transit flows
  - competing land corridors, on different which are axes used mainly for transit cargoes (including land / sea on other routes than Black Sea).

B. Country specific
Summary of key point arising from first meetings

AZERBAIJAN

After the introduction and MoS presentation, NS described his role and offered to facilitate contacts not only for Azerbaijan but also with his NSs colleagues of other Countries. He explained the national transport policy and links with TRACECA and insisted on the following:

- the Port of Baku and its location nearby City center cannot be operated fully. The perspective of the future port North of Baku should be taken into consideration in the MoS developments.

- Innovative improvements are expected from the future port complex; it would be appreciated that all projects give their advice for this and be coordinated.

GEORGIA

- The "**two markets**" - trade and transit flows – i.e. strategic challenge for Georgia and their economic impacts
  - On the "**two corridors**": preference for the main axis option on which investments are also concentrated (see below)
  - On the "**two ports**" options: this might be considered as a port system, and it is justified by the big maritime carriers' choice

- **Transport policy**

  Authorities are expecting new trades from new services, and have a particular interest in market research for the benefit of the existing and new maritime links.
  The new Ministry for Regional Development and Infrastructure is in charge of the policy in coordination with the Transport department.

- **Expected developments**

  - Sea-rail:
    . Batumi – Bulgaria
    . Poti / Batumi – Samsun (with gauge interchange)
  - Ro-Ro
    . Poti – Burgas and Russia
  - Poti / Batumi – Ukraine
  - Bulgaria: bilateral agreement between MoTs on Rail and Ro-Ro services
  - Rumania: exchange of information for direct Ro-Ro services

- **Ongoing or planned investments:**

  No transport master plan, but consistency of investments and actions for increasing and improving transport capacities along Baku – Tbilissi – Black Sea corridor (a challenge).
  Several projects with several multilateral financing institutions (EIB, WB, JICA…)

  - Ports: new container terminals in Poti (6 existing + 2 = 8 independent terminals in future)
  - Logistic zone: large project nearby port area

- New Railway sections
- New highway sections

KAZAKHSTAN

- **Ministerial contacts**

N.S. stressed the necessity to meet Ministries and institutions in Astana, mainly Transport (several departments) and Customs Departments.
He offered to write to the Ministers in charge for this purpose, and insisted that no trip to the port of Aktau should be done before writing Astana.

- The consultants were received at the Ministry of Transport in Astana as a continuation of the a/m meeting. A general presentation was made to several staff of the MoT. This was followed by a technical meeting on legal issues, and by a visit to the Customs Control Committee.
- The field visit to Aktau Port was made by experts on June 3-5 2009.

- **Code of Transport**

A new Code of Transport is being prepared by NIT-TK (headed by N.S.). A legal framework for the development of intermodal transport should be part of the Code.

Kazakhstan is a contracting party to most trade and transport International Conventions that should have superseded the national regulations. The challenge is to implement the former and to effectively adapt the latter.

Modern identification devices are used for monitoring / controlling national transports, and these have been extended to transit (border to border) for tracking purposes (See report: Customs control: the case of Kazakhstan)

- **Regional / bilateral relationship**

The relationship is more advanced with Azerbaijan, the priority being between the two ports of Aktau and Baku.
It is intended to develop more the multilateral approach.

UKRAINE

N.S. commented as follows the introduction and presentation, including MoS definition and cases.

- **Importance of legal framework**: addressing legal issues could start with difficulties as identified by the Ministry of Transport, and possibly for each transport mode (sea and land plus intermodal)

- **Approach with other institutional stakeholders** (Ex: Customs…): this will be done in liaison with Ministry or through its channel.

- **Perspectives for infrastructure investments** in the MoS projects would be assessed during the "Pilot" phase.

- **Bilateral relationships**: Following ministerial meetings with Turkey, the two countries are working on new links including transit in Ukraine to North Europe.

- **Support to field visits and coordination** with events, as done for experts' mission to Ukrainian ports and for the Odessa events.

2.2 Events

2.2.1 Kiev Workshop and conclusions

On May 19th-20th, 2009 the Ministry of Transport and Communication of Ukraine (MTCU) hosted the project workshop. The event was targeted at TRACECA NSs and representatives of transport authorities of the five project beneficiary countries and aimed to promote the "Motorways of the Sea (MoS)" concept. It was attended by 25 participants and was co-chaired by Mr. Grygoriy Legenkiy, TRACECA NS for Ukraine, and the project Team Leader.

This workshop was the first event dedicated to the Project and arranged with the beneficiary Countries National Secretaries. The objectives were:

- to share the first findings after the series of meetings with NS and MoTs in the beneficiary Countries and field visits in capitals and ports of two Countries (except Turkmenistan)
- to exchange on the MoS strategy, characteristics, obstacles and markets on the bases of these information and resulting analyses

The following conclusions were adopted on 20th May at the last session of the Workshop, which represent the scope of key issues raised during the whole workshop in Kyiv.

MoS STRATEGY

Participants acknowledged that the MoS project has a potential to contribute to the trade and transit routes on the TRACECA corridor and to develop their advantages in comparison to the other (non-TRACECA and land only based) corridors. To meet this objective, it was agreed that the project needed to pay attention to the existing transported cargoes, and to those that potentially could be attracted by the MoS solutions.

Picture 1. Northern Europe – Asia – Europe corridor

Source: International Road Union.

Picture 2. Southern Europe – Asia – Europe corridor

Source: International Road Union.

Picture 3. Central Western Europe- Asia- Europe corridor

During the workshop draft SWOT analyses (as per ToR abstracts) were examined and partly updated; the exercise will be completed with further findings and exchanges for each Country.
Revised syntheses will be submitted to TRACECA N.S.s and Ministries who will check and provide additional relevant elements.
The regional TRACECA synthesis will contain the elements in common for several Countries and for the corridor.

The objective is to share the vision and to precise the strategy of the maritime intermodal axes and solutions.

The two main key conclusions of the workshop in this respect were about:

- market potentialities, including possible opportunities resulting from the crisis, of empty equipments (containers or other factors)
- the competition of all land corridors, Northern and Southern, and for both trade and transit flows.

BARRIERS

Note: the term "barrier" was preferred to "bottleneck or obstacle".

The main barriers identified by participants were said to be:

- the lack of intermodal transport coordination (e.g., communication between road and ferry transport, adjusting ferry schedules, etc.)
- customs and non-customs (border-crossing, security) controls
- applied tariff structures (mainly railway and port operations)

- the weaknesses of legal instruments between countries and modes and for intermodal transport at national and regional levels (defined roles and responsibilities of all parties in the transport cycle).

The approach and experiences of the Mediterranean MoS pilot projects dealt precisely and in details with these barriers in the same fields.

Similarly, MoS pilots for the region will require both “hard” and “soft” measures/interventions to realise. As a rule, the work on pilots is starting from the identification of existing barriers and will progress with a series of solutions to solve these problems. So far project experts did not notice major “hard” barriers in a MoS perspective, but rather some constraints in ports for transit operations. Therefore, the existing TRACECA routes cannot be named as the main factors restricting traffic development in the region when taking also into consideration the practical steps taken by Governments to develop ports and container terminals, and upgrade roads, while parallel actions should be taken on the “soft” side: organisation, operations transport and port transit / border-crossing services, border-crossing towards efficient door-to-door solutions.

Barriers identified at national and regional levels will be addressed case by case in synthetic technical notes with the following contents:

- identification of barrier fields. Ex: legal, technical, commercial…
- consequences / impacts. Ex: overtimes, extra-costs…
- possible (feasible) solutions or proposals
  . short, medium, long term
  . suggestion coming from?
- concerned stakeholders, decision makers concerned by solutions
- actions to be taken. Ex: contacts, further approach, "ad hoc" groups…
- tentative planning and periodic update

MARKET ASSESSMENT

Participants stressed that in the view of optimising the routes on TRACECA corridor it is necessary to study the existing and potential types of transported cargoes, their origins/destinations. The lack of appropriate data to be used to produce estimates to assess market potentials was frequently mentioned by the participants.

It was agreed to develop several approaches for obtaining and sharing the most appropriate knowledge of the MoS potentials and market conditions:

- compile and retain the most relevant data from recent parallel studies

- identify loopholes of those studies and further needs for MoS markets developments

- combine mixed approaches and methods for the sake of consistency, completing when necessary the above with other sources and mainly interviews of market players, including transport cases for new potentials

- conduct more in-depth analyses with more operators and users following the preliminary investigations on those potentialities that appear to be promising, the new market opportunities lying in:
  . certain type of cargoes, based on technical and economical advantages of the return of empty containers or containerisation of non-containerised products

. door to door solutions along the corridor for containers and rolling stocks, using sea-rail and sea-road combined transport in order to redeploy maritime intermodal schemes (for both "de-containerised" and new potential cargoes) vs the competitive land corridors.

- address specifically direct trade markets (export / import of beneficiary Countries) and transit markets

- exchange with other TRACECA regional and national projects on all the above, as agreed earlier and reconfirmed recently in Brussels at an inter-contract meeting.

IMPORTANCE OF REGIONAL TRANSPORT AGREEMENTS

It was mentioned that two conventions (on multimodal transport and on forwarding activities) should be signed by TRACECA Countries on June 15-16, 2009. These two framework documents will set roles and assign responsibilities for the transport participants.

These legal instruments to be applied in the future are raising great expectations for the development of intermodal and MoS transport solutions since not all beneficiary Countries have joined international conventions.

Depending on the implementation agenda, practical steps could be retained meantime for MoS projects.

COORDINATION WITH OTHER PROJECTS

The EU Delegation in Ukraine stressed the importance of the coordination between projects should take place at a wider and a more strategic (macro) level than at national or bilateral level and for specific issues only.

In this respect, the EU Delegation had already arranged several thematic meetings on projects initiated in Ukraine, and all other projects were requested to coordinate on their events and documents (translated), starting with the all Ukrainian projects meeting scheduled in Odessa after the International Forwarders` Day (week 8 – 10 June).

NEXT PHASES

Short term activities will be:

- to progress on the strategic viewpoints at National level in each beneficiary Country through:
  . the SWOT and barrier exercises
  . national stakeholders meetings, on dates to be fixed with TRACECA National Secretaries

- to enlarge this at Regional level after the above meetings.

- to develop awareness and promotion in line with the ToRs, at other national or regional events (Ex. Odessa early June 09), and on the Web site.

Note: Although it had been requested to develop the Web site within the framework of the general TRACECA Web/portal, this may be done earlier in case the latter is delayed.

2.2.2 Transport Week in Odessa

Several events were combined in Odessa for this transport week.

June 08-09	International Forwarder`s Day
June 10	Inter-Transport 2009 Exhibition
June 11-12	8th International Conference "Black Sea Region: transport communication environment between Europe, Asia and other continents".

On June 8th the Senior Legal Expert presented the MoS project to a wide international transport audience.

In addition to the contact networking opportunities, the following key findings even made:

- Railway remains the most familiar transport mode in CIS and Eurasia, especially for the long haul transport.

- Railway competes with the maritime transport mode in Eurasia. As a rule, Railway is preferred on account of transit time between Asia and Europe, which is at least twice shorter, and as market operators are considering that Chinese ports are overloaded.

- There is a strong railway cooperation in the Eurasian region, which is supported by the Organisation for the Cooperation of Railways (OSJD).

- Several block trains are operated on the North-South and East-West corridors. The best quoted example is the "Viking" train operated between the Baltic sea (Klaipeda) and the Black sea (Ilyichevsk). One-way journey takes 52 hours in total including 0.5-hour at each border point. Besides, the "Viking" project managed to ensure regular working group meetings on railway tariffs.

- The lack of competitive legal framework for transhipments in Ukraine appears to be a limiting factor for attracting potential cargoes from Southern Russia (Samara) to Black Sea region. Therefore, cargoes keeps moving from Samara directly to Saint-Petersburg.

Note: this issue was later addressed in the "barrier" exercise. See below in Chapter 3.

- Customs inspections in Ukraine: the introduction of a single document CIM-SMGS (for railway transportations), integrating the characteristics of a railway bill and a customs declaration has allowed to reduce delays of border-crossing inspections by up to two (2) working days.

- Port Customs inspections: although there are already several dry port facilities available in the vicinity of Odessa, sea ports are remaining the inspecting points of the majority of incoming containers, this situation being mostly due to the lack of legislation for dry ports in Ukraine.

2.3 Inter-contract/ EU coordination

2.3.1 Projects coordination meeting Brussels

The inter-projects coordination meeting convened by the European Commission in Brussels on May 12th, 2009 gathered representatives of the following projects:
- Transport Dialogue and Interoperability (newly launched)
- International Logistics Centers for Western NIS and the Caucasus
- International Logistics Centers for Central Asia
- Motorways of the Sea for the Black Sea and the Caspian Sea.

The objective was to strengthen coordination between projects, ensuring that synergies are created and minimise overlapping, for which the E.C. synthetised their instructions for further coordination and exchange of information.

Project consultants presented their respective progresses and confirmed they had already started to cooperate and exchange Inception Reports and contacts.

Note on MoS Projects and other Contracts

The following is an update of the note that was prepared for the above coordination meeting. It aims at clarifying the objective and characteristics of the Motorways of the Sea (A. Intermodal maritime based transport solutions) and reciprocal benefits with the other projects (B. Synergies)

A. MoS are Intermodal Transport solution, implying:

1) Integration between maritime and land transport modes, with specific focus / promotion of maritime segments; inter operability coordination between sea and each inland mode (road, rail and waterways)

2) Improvement of port transit operations and procedures, port issues being addressed as both sea / land interfaces and border crossing points;

3) Efficiency of operations, organisation and management of each segmental links - land/port/sea/port/land - (the "five parts" chain) and of the whole chain (intermodal connectivity / inter-operability)

4) Different scopes of trade potentials:

- Operators using their own dedicated inland facilities: big shippers with large cargo volumes using dedicated logistics facilities, transport operators' dry ports/depots (maritime carriers or lessors), Container Freight Stations (C.F.S.)…
- Non potential cargo flows excluded when moving along non relevant MoS itineraries (all land transport, too distant from the Central Caucasus corridor)
- Different consolidation objectives targeting high volumes (ships, trains…)
- Potential trades identified in terms of transport units (containers, rolling units…) and their corresponding groups of products, including containerisable commodities.

5) Involvements and commitments from diverse stakeholders and from various sectors of the transport

- At national level, from public and private sectors;
- At international level, from two or more Countries, beneficiaries and non-beneficiaries.

B. Synergies

1) Exchange of information, including shared analyses, mainly on market knowledge ("pooling analyses f.i. on forecasts / prospects)

2) Exchange of contacts

3) Joint field visits and events (in light of each contract rules)

4) Respective connections with operators' "inland" transport logistics (dry ports, inland container depots…)

2.3.2 Projects coordination meeting Odessa

The inter-projects coordination meeting in Odessa was organised on June 10th, 2009 upon the initiative of EC Delegation in Kiev. The representatives of the following projects took part in the meeting:

- Ukraine Port Feasibility Study
- International Logistics Centers for Western NIS and the Caucasus
- Support to the Integration of Ukraine in the Trans-European Transport Network TEN-T
- Integration of Trans-European Transport network and border crossing points, Belarus-Ukraine
- Motorways of the Sea for the Black Sea and the Caspian Sea

The discussion focused on the following points:

- **Traffic forecasts** for Ukrainian ports: these should be completed in the Feasibility Study project mid-July 2009.
  The project representative agreed to share the study data when available.
  It was stated that due to the global economic crisis the Odessa HPC terminal was now lifting only 20.000 TEUs per month compared with 1.2 million in year 2008, which confirmed the needs and difficulties to re-assess forecasts.

- **Port management models**: were discussed the facts that Ukrainian ports were not organised in landlord model nor utilising KPIs.

- **Legal/institutional framework.** It was noted that the lack of legislation for Ukrainian ports was not in favour of competitive transhipment traffic scenarii in Ukrainian ports, as compared with Constanza Romania which continued to operate as the transhipment hub in the Black Sea.

- **Transhipment costs of container** through Ukraine ports: reported to be twice or more than transhipping through Constanza. Dwell times of 13 days in Ukrainian ports were quoted and compared with 6 hours in E.U. ports.

2.4 Synthesis/ outputs: clarification of key MoS related issues

2.4.1 Vision/concept

The MoS strategy and concept as described in the ToRs were further clarified since the first presentations made in the initial stages and documents are being used regularly. The various TRACECA policy papers that are also referring to the MoS are reminding the same general vision which is retained also in other neighbouring regions MoS projects: Baltic / North Sea and Mediterranean / Black Sea .

The Questions and Answers and the MoS SWOT exercises are aiming at precising the concept and clarifying the perception within the concerned stakeholders' circles.

The shortened definition of MoS as "maritime based intermodal transport" is properly reflecting the concept: it implies further the following key words:

- integration / integrated solutions or package

- improved transport schemes for the whole chain (door-to-door) and for its segments

- fields of advanced solutions:
    - transport operations and services in all segments
    - procedures, formalities and controls along the chain and particularly at port / border crossing points
    - I.T. systems and solutions

- feasibility, viability and sustainability (including replicable characteristics)

- added value for trade, economy and environment

The challenge is to transform the MoS vision concept into packages and market solutions:

- designed for customers (shippers and their service providers)

- with operators, by mode and intermodal

- with institutional supports (MoTs, Customs and other procedural bodies…)

2.4.2 Market scope

The following table is an update of the Inception Report version, with amendments and precisions that were required in meetings and contacts, and prepared after the Kiev Workshop.

Relevant market scope

Scope	Comments / Questions	Approach/Replies
• Non beneficiary TRACECA Countries:	Repeated requests for clarification and demands of specific Project presentation at national levels from Bulgaria, Rumania and Turkey (non-direct beneficiary Countries)	Replies made (in coordination with E.C./Brussels): • Definitely all Black Sea Countries will be involved in the MoS projects although: • Priority must be given to direct beneficiary Countries according to TRACECA agreements and procedures • Opportunities of regional meetings or other events attended by direct/ non direct beneficiary Countries will be seized to circulate all information on project developments • General information will be made through the web site (when TRACECA web site ready or earlier if so required), and circulars meantime
- East of Caspian Sea and West of Black Sea	Enlarging regional dimension	When and as using MoS, with inland links including potentially
- Black Sea specific : Moldova	Request from Moldova delegation in Bucharest 30 March	Not a beneficiary Country in ToRs To be considered with future Container Terminal developments (2010)
- Central Caucasus specific: Armenia	Neighbouring Countries along central request of axis	When and as using MoS with inland links including potentially
• Land transport of external trade, in transit only	West, North and Central Europe Asia and other continents	MoS Axes designed for all land / sea cargoes Contributing to increase volumes and services Condition: not detrimental to regional and inter-regional trades
• Maritime transhipped / feedered trade = Non regional / overseas	Example: Asia – Black Sea via Mediterranean T/S Hub port	Contributing to increase volumes and services Condition: not detrimental to regional and inter-regional trades

2.4.3 Glossary

Participants at the Kiev Workshop, including other Projects represented, confirmed the views already expressed in various meetings that the same words and understanding should be used and shared for the project developments.

The task of preparing a glossary was launched thereafter by the team, who concluded that it would be necessary to retain words, expressions and definitions from the most official sources first.
The exercise started with the most complete and official glossary, as adopted by UNECE and generally used by the International Transport Forum (ITF, formerlly CEMT), and it is being completed now for some missing key words with other institutional and professional sources.

This first output, as per **Annex 2** is the first complete base selection of the most relevant words and expressions (Russian and English versions), including "Motorways of the Sea" (Contract ToRs definition).

3 Investigations

Introduction: Report and information surveys

Most of the relevant reports had been reviewed before the period covered by this report, including provisional versions for some of them as mentioned in the Inception Report. The "Maritime links" and "Traffic flows" reports were still incomplete, though providing some of the necessary data and information for the approach of the economic, commercial and Port backgrounds. The other Ports studies (Ukraine, Aktau, part of Turkmenbashi) helped to complete these first pictures.

The analysis will be reviewed when the final versions of the two first and base studies are made available, as and when there is some relevance for such updates.

Separately, all professional sources and practices were retained for obtaining additional information and updates, particularly for field visits and contacts, and when it appeared that the above information had been superseded by the course of events, mainly the economic crisis.

Transport logistics media (magazines, web-sites) are reviewed regularly and experts are also consulting their own sources and contacts in the region and in W. Europe.

Information and data obtained from the above sources and channels were and are still recouped during the field visits and in all forms of contacts of each expert of the consultant's team.

3.1 Existing and potential markets General economic approach

The market survey is conducted at several levels and in several ways started with an economic review of the data contained in the TRACECA Reports, which were enlarged to other international or national sources.

The following is a presentation of these data and information processing.

- Global traffic
- Traffic excluding bulk liquid
- Origins and destinations
- Containers: region O/D
- Rail and Ro-Ro
- Traffic at border points

- **Introduction**

The first views of port traffic generation are found in the following studies:

- Improvement of maritime links between TRACECA Corridors and TEN Corridors
- Aktau Port Development, Master plan and feasibility study for Port of Aktau in Kazakhstan
- Navigational Channel for Turkmenbashi Port (TRACECA)
- Analysis and forecasting of traffic flows for the TRACECA Countries and interregional Transport Integration

- **Global traffic – All trades**

The results from the "Improvement of maritime links between TRACECA Corridors and TEN Corridors" study were used in priority as the study was almost finished and the figures should not change. "Analysis of traffic flows" was then used to fill in missing data in particular for Baku International Port. Some recent data were also collected in specific port studies and during interviews by the consultant's team.

Reported volumes are still provisional as some discrepancies appeared depending of the sources, and should be recouped before final validation.

The following problems were met while processing data:

- discrepancies the "Improvement of maritime links between TRACECA Corridors and TEN Corridors" study: for example, figure for Ilyichevsk differ when comparing traffic recorded in the annex (p146) and traffic presented in table (P38). Concerning Constanta, there is a mistake in table p58 describing container handling in recent years.
- discrepancies between the "Improvement of maritime links between TRACECA Corridors and TEN Corridors" and the "Analysis and forecasting of traffic flows for the TRACECA Countries" database: for example when comparing the total cargo traffic in some ports as illustrated in the following table.

Table 1 – Comparison of traffic results in the two studies

Port	"Traffic Flows"	"Maritime links"
Haydarpasa (2006)	3,736,426	3,792,000
Derince (2006)	957,964	2,551,000
Samsun (2006)	814,467	2,047,000
Poti (2007)	7,700,000	7,732,000
Batumi (2007/2006)	11,200,000	13,190,000
Illyichevsk (2007)	16,034,300	16,969,100

- discrepancies within the "Traffic Flows" database. Aggregated data (Total) do not always tally with detailed data. Units adopted are not systematically specified. In the Port.xls file, distinction between transhipment, cargo loaded and unloaded is not very clear and result not always congruent.

A revised analysis will be made when the "Traffic flows" database is completed and validated.

- **Global Traffic**

Table 2 – Ports Throughput by type of cargo (Million tons) (Provisional)

Country	Port	Year	Container	Gen. Cargo	Ro-Ro & Rail F.	Dry Bulk	Liquid Bulk	Gen. Cargo & Dry bulk
Azerbaijan	Baku	2007					3.488121	1.980268
Bulgaria	Bourgas	2004	0.302	2.712	0.07	4.858	8.045	
		2005	0.315	2.573	0.06	4.583	9.053	
		2006						
	Varna	2004	0.98	0.6	0.41	6.97	0.53	
		2005	1.038	0.6	0.46	7.374	0.789	
		2006	1.18	0.65	0.38	6.724	0.942	

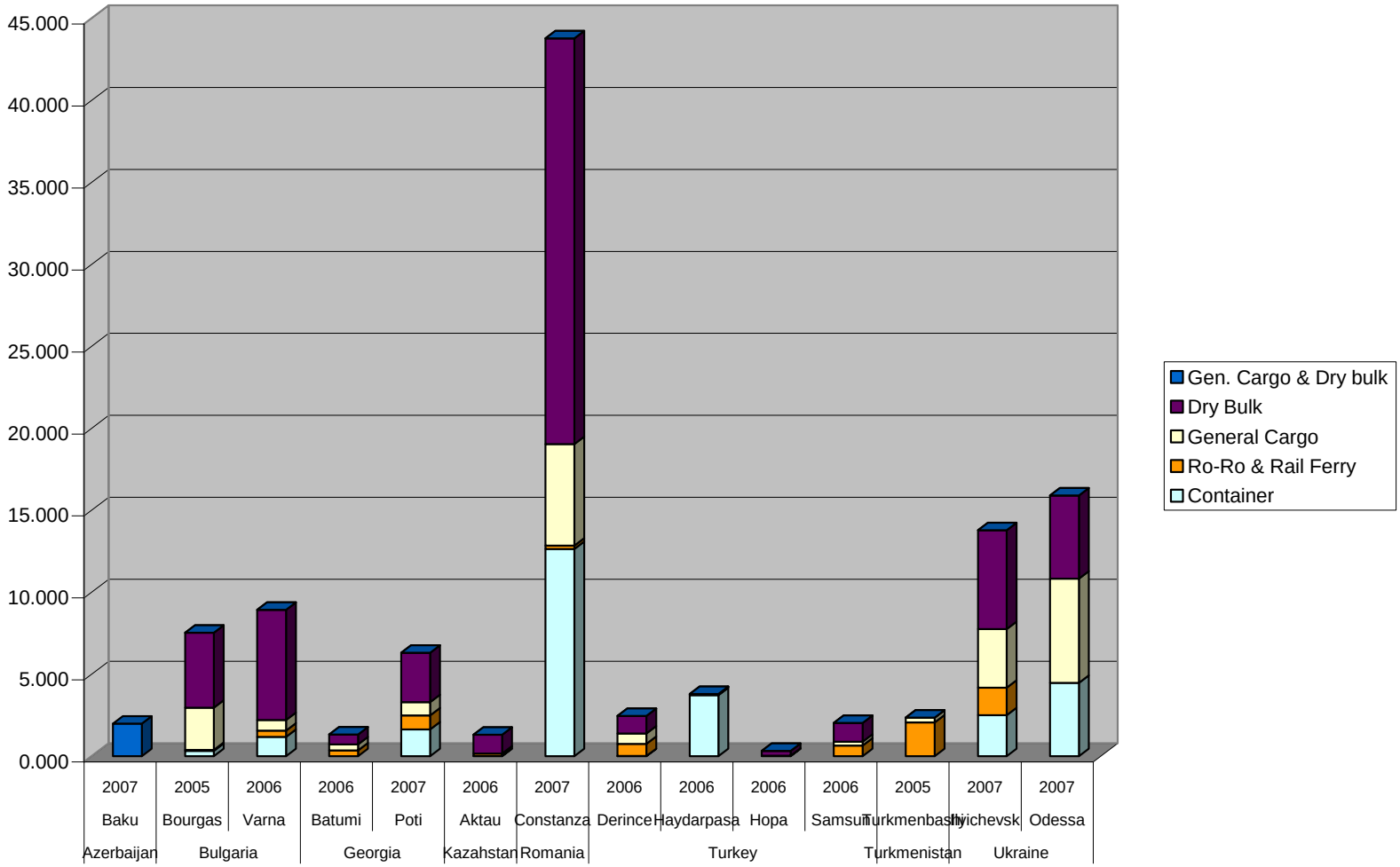
Country	Port	Year	Container	Gen. Cargo	Ro-Ro & Rail F.	Dry Bulk	Liquid Bulk	Gen. Cargo & Dry bulk
		2007						
Georgia	Batumi	2004		0.43	0.66	0.224	6.86	
		2005	0	0.4	0.41	0.309	9.89	
		2006		0.37	0.35	0.6	11.87	
		2007						
	Poti	2004	0.882	1.18	0.43	2.45	1.19	
		2005	1.035	0.94	0.72	2.47	0.96	
		2006	1.148	0.71	0.75	2.92	1.17	
		2007	1.632	0.81	0.85	3.02	1.42	
Kazahstan	Aktau	2006	0.01		0.148	1.146	9.9	
Romania	Constanza	2004	3.92	6.08	0.06	28.12	12.73	
		2005	7.44	6.61	0.23	31.02	15.33	
		2006	9.82	4.87	0.14	27.62	14.68	
		2007	12.64	6.2	0.2	24.74	14.01	
Turkey	Derince	2004	0.012	0.5	0.59	0.8	0.065	
		2005	0.005	0.56	0.74	0.849	0.062	
		2006	0.005	0.64	0.74	1.073	0.093	
		2007						
	Haydarpasa	2004	3.129	0.05	3.27	0.008	0	
		2005	3.47	0.06	1.09	0	0	
		2006	3.712	0.03	0.04	0.01	0	
		2007						
	Hopa	2004	0	0.018		0.281	0.012	
		2005	0	0.03		0.266	0.015	
		2006	0	0.012	0.01	0.292	0.024	
		2007						
	Samsun	2004	0	0.2	0.56	2.319	0.037	
		2005	0	0.17	0.65	2.212	0.034	
		2006	0	0.24	0.64	1.149	0.018	
		2007						
Turkmenistan	Turkmenbashi	2000		0.217	1.079			
		2001		0.204	1.438		5.113	
		2002		0.399	2.062		6.254	
		2003		0.412	2.781		7.605	
		2004		0.378	2.135		7.536	
		2005		0.298	2.054		6.872	
		2006			2.463			
Ukraine	Ilyichevsk	2004						
		2005	1.46	8.54[(1)]		3.89	0.99	
		2006	1.99	6.46[(1)]		5.28	1.25	
		2007	2.5	3.57[(1)]	1.6791	6.04	1.5	
		2008						
	Odessa	2004	2.26	7.4	0	2.72	18.17	
		2005	2.85	6.539	0	4.635	12.822	
		2006	3.689	7.082	0	4.325	12.914	
		2007	4.474	6.356	0	5.07	15.469	

(1) In the port of Ilyichevsk, Ro-Ro & Rail Ferry throughput is included in general cargo figures in 2005 and 2006 and distinguished in 2007.

Source: Various TRACECA studies and databases

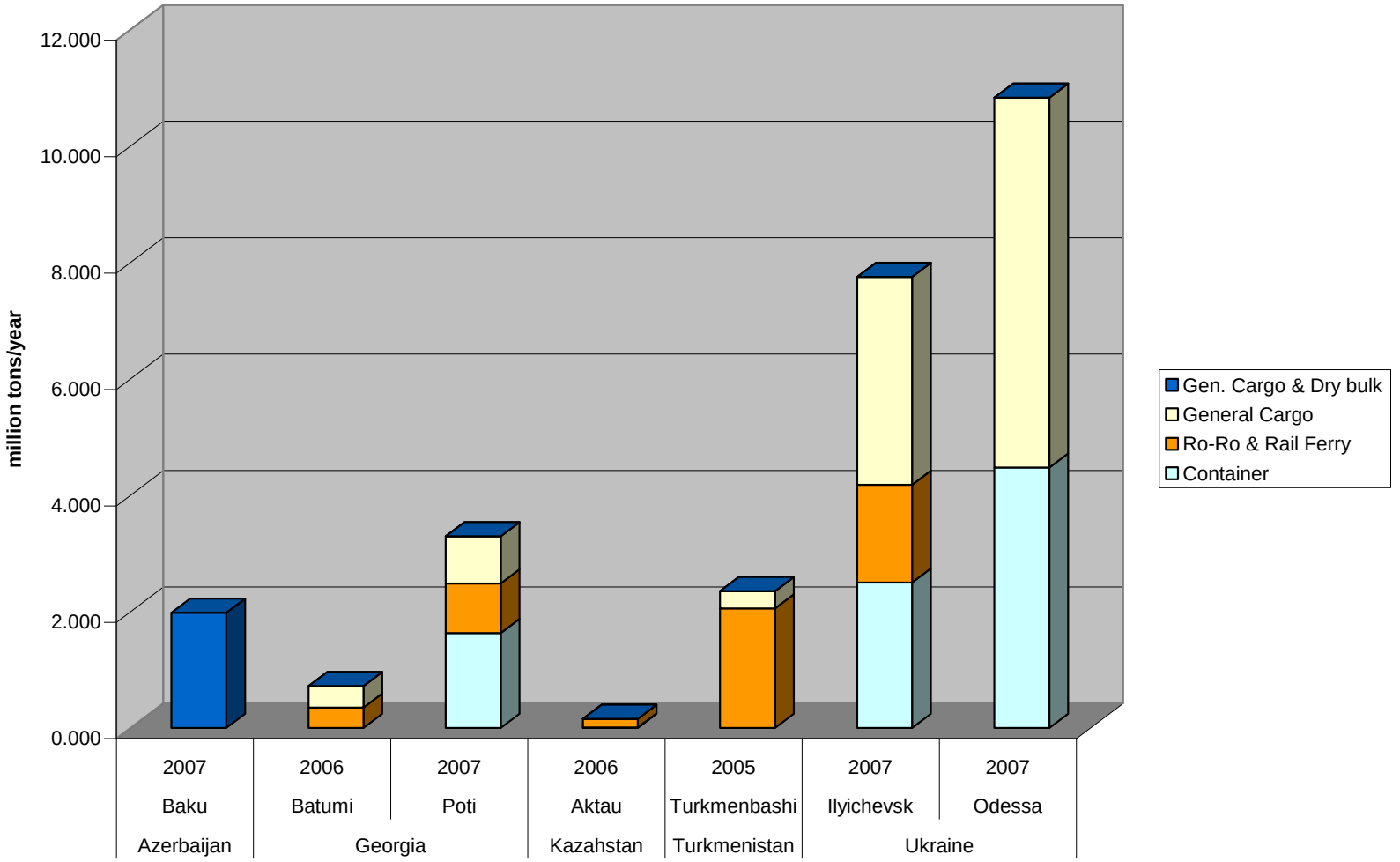
- **Traffic excluding bulk liquid**

Figure 1 - Main Black and Caspian Sea Ports Throughput by type of cargo – Excl. Liquid bulk - (Million tons) (Provisional)



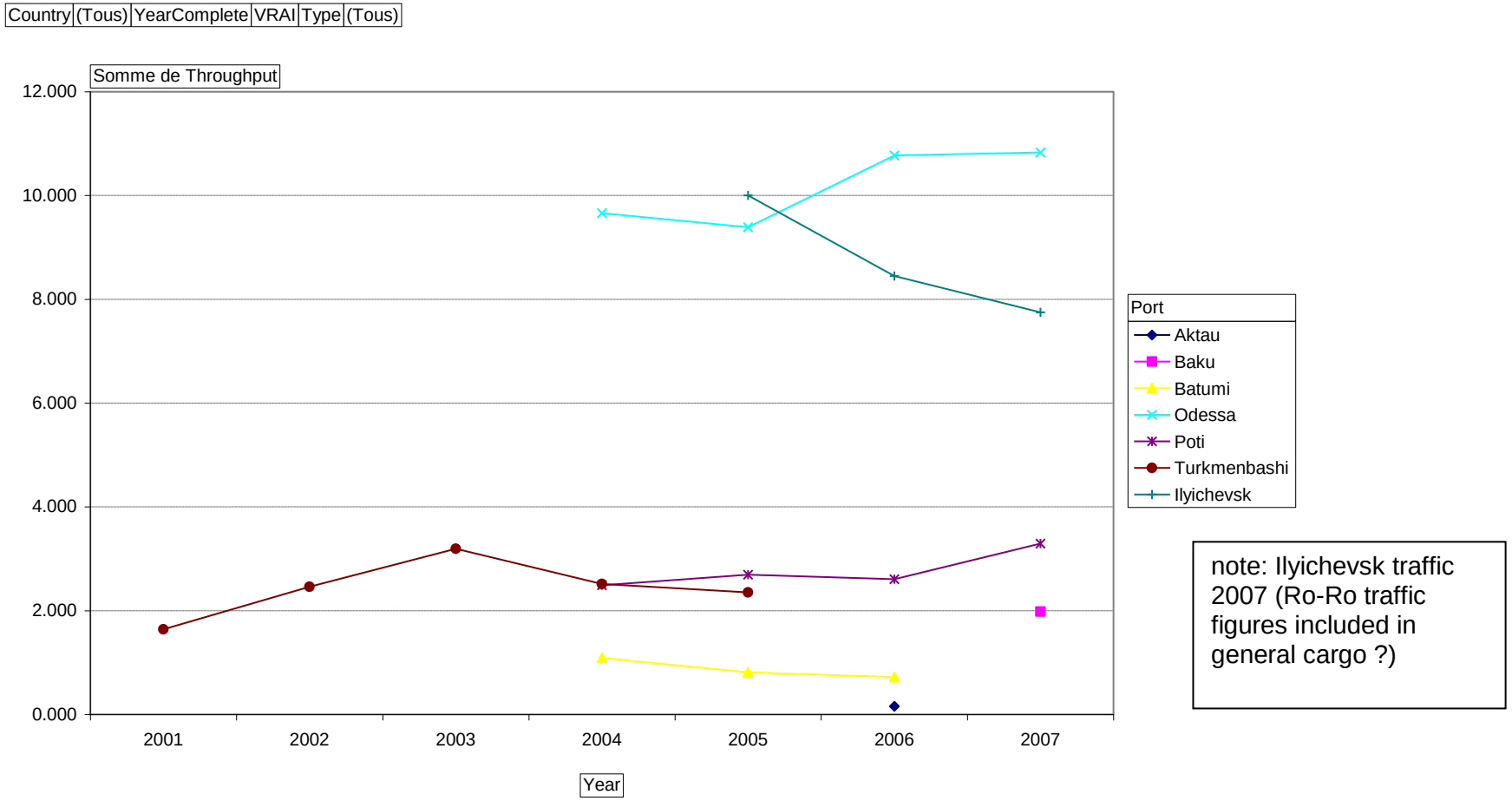
Source: Various TRACECA studies and databases

Figure 2 - Main ports of Azerbaijan, Georgia, Kazakhstan, Turkmenistan and Ukraine Throughput by type of cargo – Excl. Liquid bulk - (Million tons) (Provisional)



Source: Various TRACECA studies and databases

Figure 3 – Last year evolution of General cargo, Ro-Ro & Rail Ferry and Container Throughput of the main ports of Azerbaijan, Georgia, Kazakhstan, Turkmenistan and Ukraine - (Million tons) (Provisional)



Source: Various TRACECA studies and databases

- **Origins and Destinations**

Poti and Batumi

Detailed data from/to Poti and Batumi are extracted from "Analysis and forecasting of traffic flows for the TRACECA Countries" database (file port.xls), which provides details traffic by commodity and by main country of origin and destination.

Table 3 - Batumi and Poti Traffic by Origin and Destination in 2007 (in Tons)

	Batumi		**Total Batumi**	**Poti**		**Total Poti**
Country	Export	Import		Export	Import	
Brazil	446,994		446,994			
Bulgaria				316,341		316,341
France	180,082		180,082			
Greece				328,783	134,110	462,893
Guinea				163,718		163,718
India				609,527		609,527
Kaiman		4,496,378	4,496,378			
Italy		2,770,601	2,770,601	518,096	558,118	1,076,214
Malta		184,487	184,487			
Other	216,907	337,433	554,340	646,002	602,225	1,248,227
Romania	110,086		110,086	320,685	125,747	446,432
Russia	137,041		137,041	508,638	103,114	611,752
Switzerland		1,689,399	1,689,399			
Turkey		93,925	93,925	946,616	655,847	1,602,463
Ukraine	163,690		163,690	867,243	238,159	1,105,402
USA					91,062	91,062
Total	1,254,800	9,572,223	10,827,023	5,225,649	2,508,382	7,734,031

Source: " Analysis and forecasting of traffic flows for the TRACECA Countries"

Table 4 - Batumi and Poti Traffic by Black Sea Origin and Destination in 2007 (in Tons and %)

	Batumi	%	Poti	%
Bulgaria	0	0.0%	316,341	4.1%
Romania	110,086	1.0%	446,432	5.8%
Russia	137,041	1.3%	611,752	7.9%
Turkey	93,925	0.9%	1,602,463	20.7%
Ukraine	163,690	1.5%	1,105,402	14.3%
Other	10,322,281	95.3%	3,651,641	47.2%
Total	10,827,023	100.0%	7,734,031	100.0%

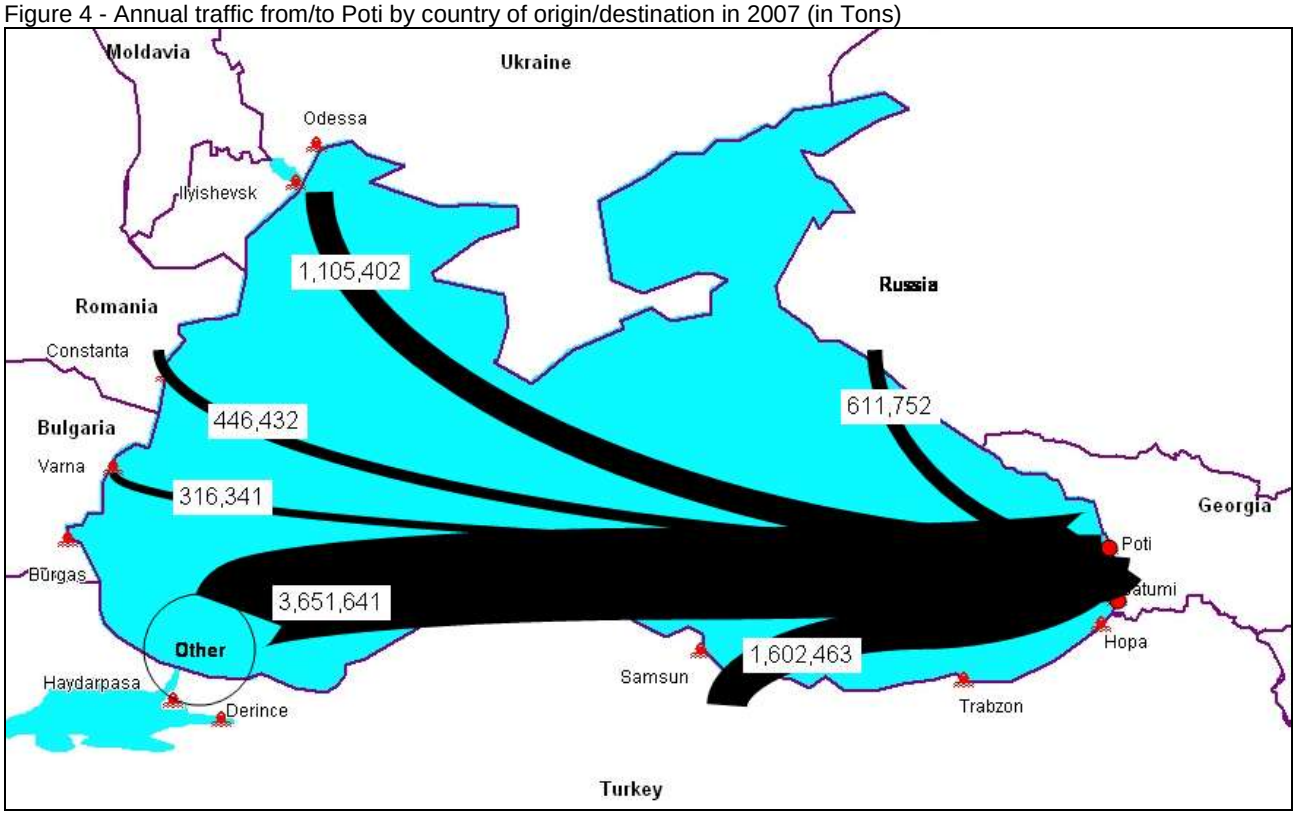
Source: " Analysis and forecasting of traffic flows for the TRACECA Countries"

Remarks:

- Total traffic for Poti in the database is close to total traffic recorded in the "Improvement of maritime links between TRACECA Corridors and TEN Corridors" study (7.73 million tons (2007))
- Total traffic for Batumi is different between the two studies but for two different reference years.

- Some figures do not obviously represent final origins and destinations (eg: importation of 4,5 millions tons of freight from Island Kaiman). This error should result from account of the country flag of ships i/o origin or destination.
- The low proportion of Batumi traffic from/to Black Sea ports should be cross-checked, although the total traffic presented is properly computed (same result as for disaggregated data by commodity)
- There is a discrepancy for Poti between the total traffic presented and the sum of disaggregated data by commodity. The annual traffic from and to Poti by country of origin/destination is illustrated in the following figure.

Figure 4 - Annual traffic from/to Poti by country of origin/destination in 2007 (in Tons)



Source: " Analysis and forecasting of traffic flows for the TRACECA Countries" database

Container Traffic

The following remarks can be made on container traffic from and to ports of direct beneficiary Countries and for the latest annual series reported in TRACECA studies:

- Ilyichevsk and Odessa were the largest and fast growing container ports in the Black Sea after Constanta. Both ports have large extension projects in order to increase capacities.
- Batumi: International Container Services (ICS) who bought the Terminals in 2007 (except Liquid Terminals) had planned to develop container capacities up to 300,000 TEU. This is the low level of projected throughput in 2020, which varies between 350,000 TEU and 500,000 TEU, the future level depending on the respective market shares of the new Poti Terminal and Poti FIZ.
- The container traffic in the Caspian Sea is not mentioned in TRACECA reports but it is indicated as very low, with Ferry lines being the main carrier of general cargo. In the "Aktau Port Development, Master plan and feasibility study", 10 000 tons of freight are reported in 2006, i.e. approximately 1000 TEU, whereas currently (2008 - 2009)a very high percentage of container and rail traffics to and from Kazakhstan are routed by rail from Odessa via Tolyatti in Russia.

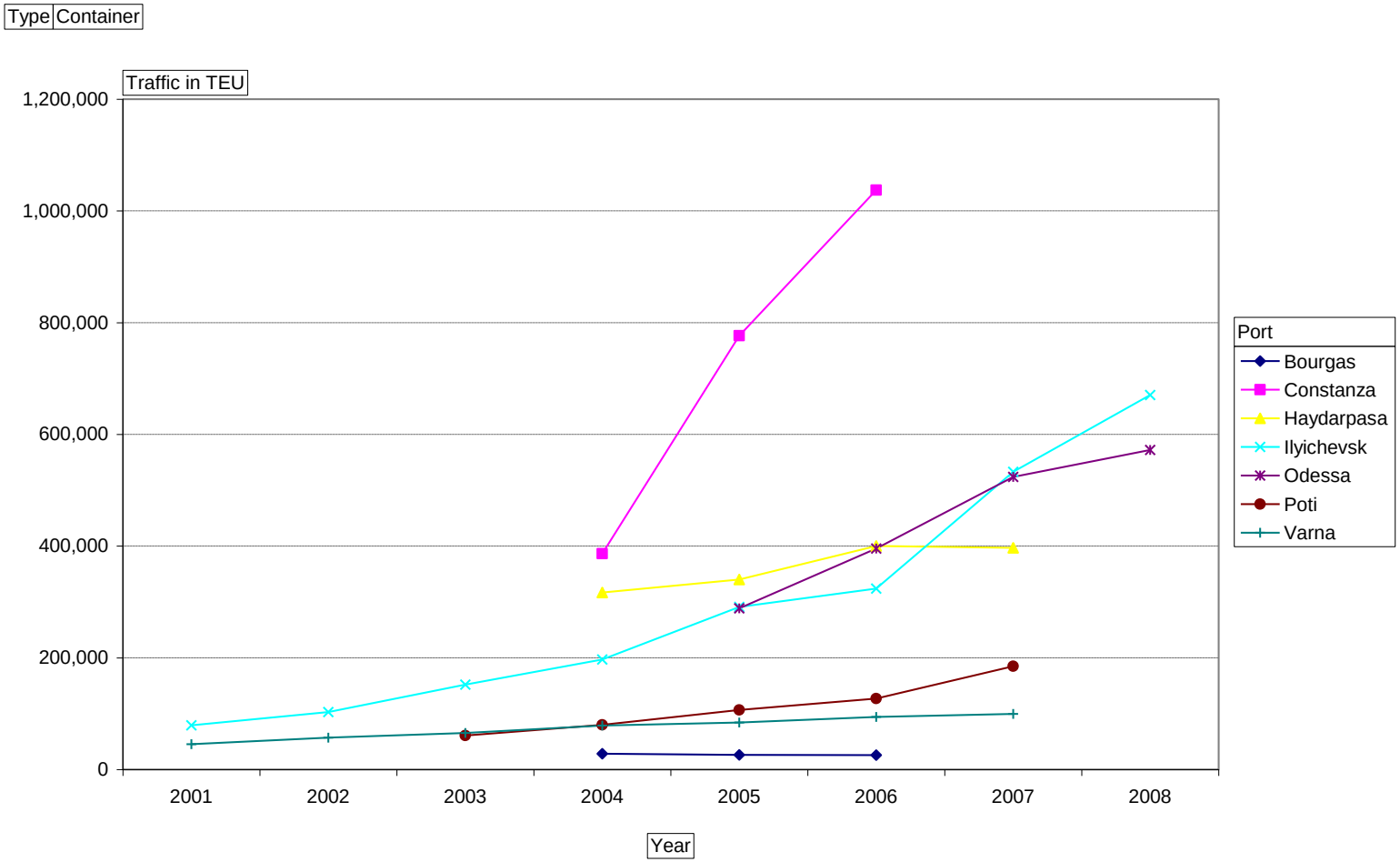
Table 5 - Figure 5 – Traffic trends in main container terminals of Black Sea (million tons and TEU) (Provisional)

Port	Year	Traffic in million tons	Traffic in TEU
Aktau	2006	0.010	1,000
Bourgas	2004	0.302	28,132
	2005	0.315	26,420
	2006		26,000
Constanza	2004	3.920	386,282
	2005	7.440	776,594
	2006	9.820	1,037,068
	2007	12.640	
Haydarpasa	2004	3.129	317,000
	2005	3.470	340,000
	2006	3.712	400,000
	2007		397,000
Ilyichevsk	2001		79,000
	2002		103,000
	2003		152,000
	2004		197,000
	2005	1.460	291,127
	2006	1.990	324,036
	2007	2.500	532,766
	2008		670,556
Odessa	2004	2.260	
	2005	2.850	288,348
	2006	3.689	395,562
	2007	4.474	523,881
	2008		572,140
Poti	2003		60,593
	2004	0.882	79,927
	2005	1.035	106,458
	2006	1.148	126,897
	2007	1.632	184,792

Port	Year	Traffic in million tons	Traffic in TEU
Varna	2001		45,500
	2002		57,200
	2003		65,200
	2004	0.980	78,600
	2005	1.038	84,100
	2006	1.180	94,000
	2007		99,713

Source: "Improvement of maritime links between TRACECA Corridors and TEN Corridors" and "Aktau Port Development, Master plan and feasibility study for Port of Aktau in Kazakhstan"

Figure 6 – Container Traffic trend of main Black Sea ports (in TEU) (Provisional)



Source: Improvement of maritime links between TRACECA Corridors and TEN Corridors

- ***Container trades (Regional and Intercontinental)***

Short Sea shipping (with the exclusion of regional transhipment / feedering of deep sea trades) is representing only a small part of the total container traffic of the Black Sea ports. A large share of container movement is generated by continental or inter-continental traffic.
Calls of ocean vessels are concentrated in Constantza, Ilichevsk and Odessa and Turkish ports (Haydarpasa, Istanbul…) with significant trans-shipments in most of these ports.

Data of the "Maritime links", based on vessel calls have been classified in three categories:

- Mar/Blk – Black Sea/Marmara Sea services – i.e. regionalshort sea services within the region.
- Eur/Med – Europe and Mediterranean services – i.e. near sea services connecting Black Sea ports to other ports in Europe, North Africa and East Mediterranean.
- Ocean – Intercontinental connecting Black Sea ports to other continents, i.e. deep sea services, mostly the Europe-Far East and Transatlantic trade lanes.

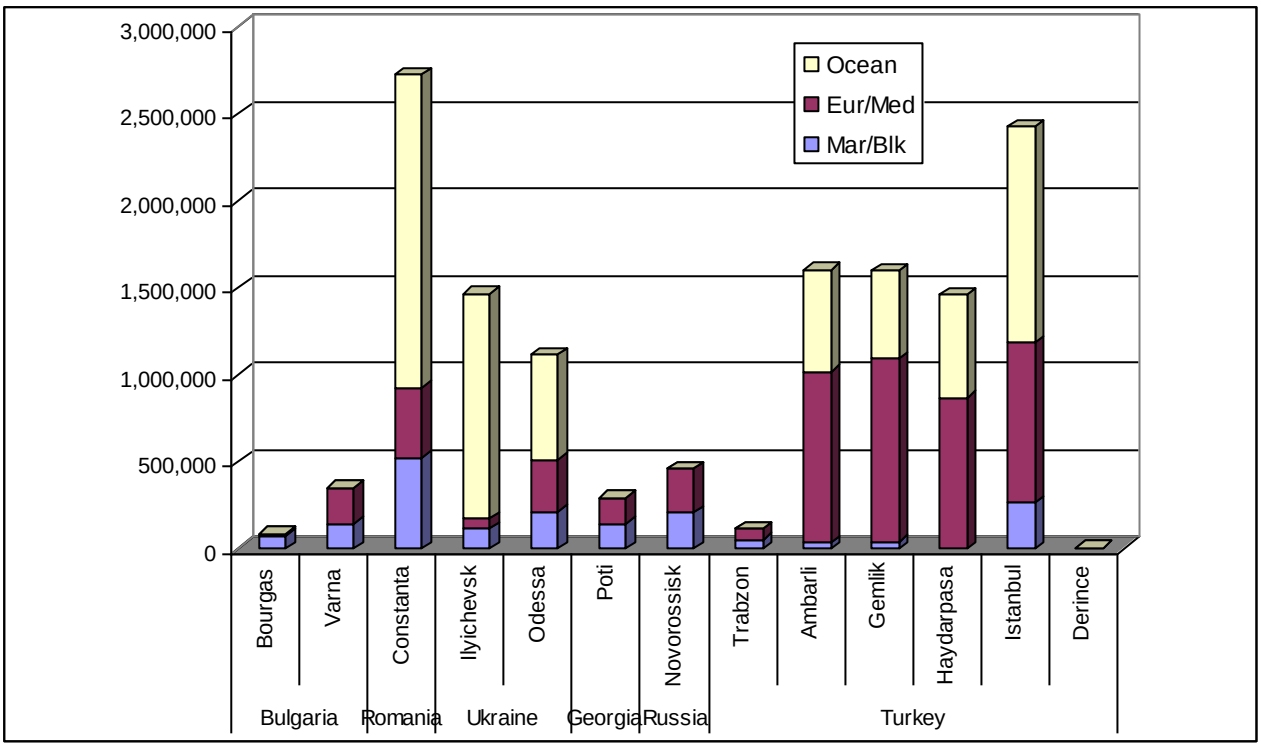
Table 6 - Analysis of Container services in the black sea by type (2007) (in TEU)

Country	Port	Mar/Blk	Eur/Med	Ocean
Bulgaria	Bourgas	75,196	11,770	0
	Varna	142,804	207,650	0
Romania	Constanta	521,738	405,333	1,795,795
Ukraine	Ilyichevsk	115,936	57,200	1,291,811
	Odessa	214,140	296,809	604,676
Georgia	Poti	145,508	145,644	0
Russia	Novorossisk	209,638	249,246	0
Turkey	Trabzon	50,752	65,304	0
	Ambarli	35,532	981,586	586,815
	Gemlik	41,700	1,052,699	505,745
	Haydarpasa	0	870,165	589,696
	Istanbul	262,968	920,208	1,240,106
	Derince	0	8,008	0

Source: "Improvement of maritime links between TRACECA Corridors and TEN Corridors" study based on MDS-Transmodal Liner Databank, 2008

Note:
There are discrepancies in the "Maritime links" report on the total number of containers TEUs between "MDS-Transmodal Liner Databank" and port statistics (including some cross-checkings made by Consultants of this project before it started). Possibly double counts may have occurred, though trans-shipments are not the only explanation.

Figure 7 - Analysis of Container services (2007) (in TEU)



Source: "Improvement of maritime links between TRACECA Corridors and TEN Corridors" study based on MDS-Transmodal Liner Databank, 2008

- **Rail and RoRo Ferry Traffic**

The following data and information as resulting from the a/m TRACECA studies, have been updated by the consultant in the course of experts' field visits and recouped with other sources. They are reported here as a synthesis of the studies on rail and Ro-Ro Ferry traffics.

- Port of Ilyichevsk: combined rail ferry and Ro/Ro with a yearly capacity: 4.5 million tons and 150,000 trucks
- Port of Odessa: ferry terminal and Ro-Pax line with Istanbul, no rail ferry facilities
- Poti/Batumi: Both ports served by rail ferries and Ro/Ro lines linking with several Black Sea ports. The two ports are used by competing maritime operators, making them the "port system" of Georgia.
- UKRferry operating Combi ferries (Rail/ Ro/Ro and some Containers) from Ilyichevsk /Odessa to Poti/ Batumi and Kerch more recently.
- Port of Baku, Port of Aktau, Port of Turkmenbashi: RoRo and Rail Ferry lines operating between Caspian ports.

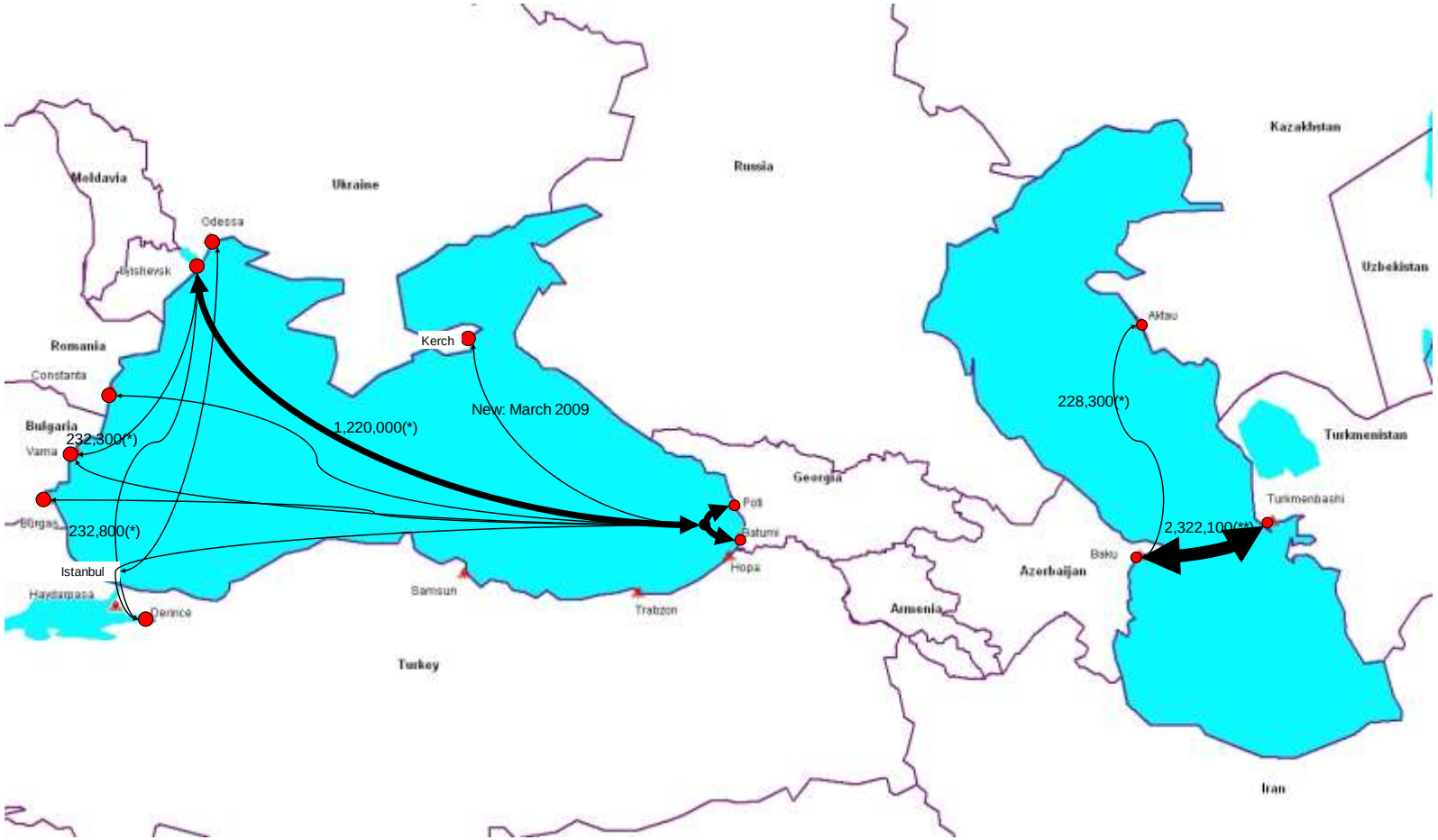
Table 7 – Main RoRo and Ferry services. Traffic in tons - (Provisional)

Service	Ports	Traffic (2007)
UKRferry	Ilyichevsk Poti/Batumi	1,220,200
UKRferry	Odessa - Istambul	
UKRferry	Ilyichevsk – Istambul	232,800
UKRferry	Ilyichevsk – Varna	226,300
UKRferry	Kerch – Poti/Batumi	New
SOMAT - SILKLINK	Burgas / Novorossisk / Batumi	
MARFA NAVE FERRYBOT	Constanza – Samsun / Batumi	
	Baku – Aktau	228,300
	Baku – Turmenbashi	2,322,100

Sources: "Traffic flows" study Port studies, databases and interviews

Links and flows are illustrated in the following figures

Figure 8 - Main RoRo and ferry lines – Traffic in tons (Provisional 2007)



Source: Various TRACECA studies and databases
(*) "Analysis and forecasting of traffic flows for the TRACECA Countries" database (provisional),

Some discrepancies should be reduced, mainly for Aktau port, with different data from different studies.

- **Traffic at borders points**

In the "Analysis and forecasting of traffic flows for the TRACECA Countries" database, traffic at the borders in quantity is reported for Georgia and south neighbouring countries only, but the figures seem to be relevant indicators of the port and land movements in 2007. (reference year of studies)

Table 8 – Border Traffic Georgia / south neighbouring countries (in Tons) (2007)

Country	Mode	Border Station Name	Border	Year	Imported	Exported	Total
Georgia	Road	Poti Sea Port	Georgia - Black Sea	2007	264,684	76,167	340,851
Georgia	Road	Batumi Sea Port	Georgia - Black Sea	2007	3,906	1,680	5,586
Georgia	Road	Sarpi	Georgia - Turkey	2007	738,234	96,642	834,876
Georgia	Road	Vale	Georgia - Turkey	2007	19,047	1,680	20,727
Georgia	Road	Sadakhlo	Georgia - Armenia	2007	41,727	37,737	79,464
Georgia	Road	Red-Bridge	Georgia - Azerbaijan	2007	121,569	38,094	159,663
Georgia	Road	Lagodekhi	Georgia - Azerbaijan	2007	7,077	2,079	9,156
Georgia	Rail	Batumi	Georgia - Black Sea	2007	268,732	85,470	354,202
Georgia	Rail	Poti	Georgia - Black Sea	2007	1,154,445	308,594	1,463,039
Georgia	Rail	Gardabani	Georgia - Azerbaijan	2007	1,666,058	836,029	2,502,087
Georgia	Rail	Sadakhlo	Georgia - Armenia	2007	496,752	198,870	695,622
Azerbaijan	Rail	Boyuk kesik	Azerbaijan - Georgia	2007	2,509,900	7,237,800	9,747,700

Source: extracted from "Analysis and forecasting of traffic flows for the TRACECA Countries" database (provisional)

The main flows are illustrated by the following map and figures.

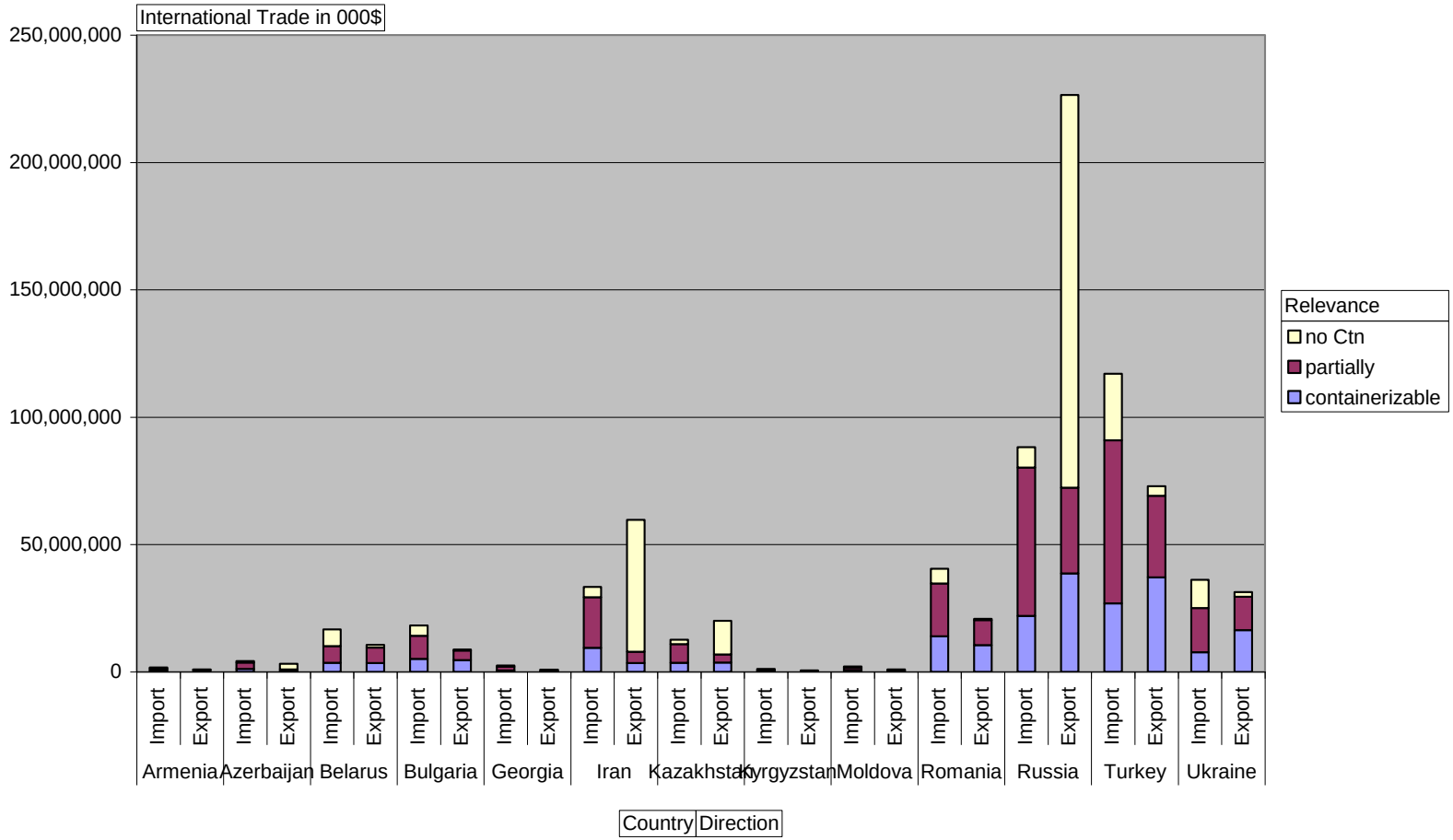
Figure 9 - Main flows at Georgia South borders (Tons) (2007)

Source: Extracts from "Analysis and forecasting of traffic flows for the TRACECA Countries" database (provisional)

From the discrepancies observed between and within reports, some homogenisation of data would seem necessary in order to reduce misinterpretations.

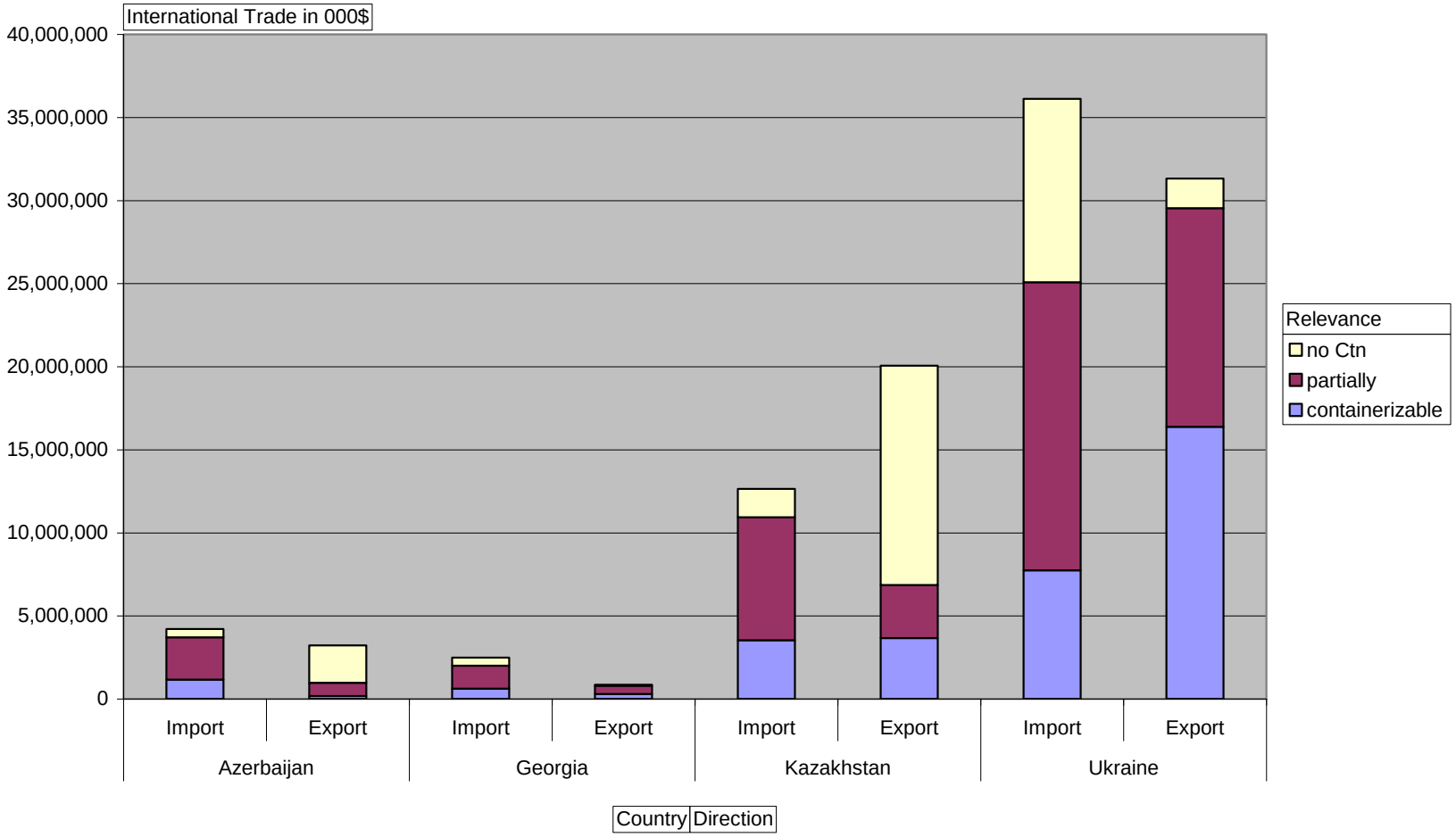
It seems important also to get from the "Traffic flows" database the present and future traffic by type of commodity and by main origin and destination in order to draw the main flows and subsequently to surround from these valuable sources the potential markets on the existing and competing corridors.

Figure 10 - International trade in TRACECA Region and Neighbours (2005) – Most relevant Commodities (US $)



Source: International Trade Centre - COMTRADE database and consultant classification

Figure 11 - International trade of Azerbaijan, Georgia, Kazakhstan and Ukraine (2005) – Most relevant Commodities (US $)



Source: International Trade Centre - COMTRADE database and consultant classification

The figures and the map are clearly showing the weight of Countries in tonnage as well as the balance in / out position of each Country. The same are also helping to undertake prior identifications of the scope and dimension of the containerised and containerisable trade products.

However this analysis does not permit to identify origins and destinations of imports / exports. It will therefore be necessary to complement it when the final output of the "Traffic flow" study is made available.

Consequently, the following is being carried out based on the Eurostat sources:

- analysis of trade between CIS (except Russia) and the other regions of the world of containerisable commodities,
- analysis of the evolution of these flows,
- focus on the most promising links such as CIS-Europe, Europe-Asia, and intern CIS flows for containerisable commodities,
- analysis by mode of transport.

3.2 Infrastructure, equipments and operations

Hereafter are the synthetic conclusions prepared by the team experts after the preparation and pre-identification phase before their field visits during the period and after the inception report for, respectively:

3.2.1. Ports
3.2.2. Railways
3.2.3. Inland Waterways

Note: Road infrastructure is not described and analysed in itself. Facilities connecting ports to road networks are mentioned in the presentations of national ports, and a separate synthesis of relevant for the road and rail transport and intermodal conditions are presented for the central axis of the Baku – Georgia ports corridor at the end of this chapter (3.2.4.).

3.2.1 Ports

Information and data collected at the end of the period are:

- for all concerned Countries and ports: the reference TRACECA regional studies "Traffic flows" and "Maritime links"
- for individual Countries and ports: the most recent specific Port studies received at this stage
- professional sources including Port Authorities Web sites and communications.

This is reporting information and findings for Azerbaijan (Baku), Georgia (Poti – Batumi) and Kazakhstan (Aktau), where the Consultant's team made field visits during the period after similar trips Ukrainian ports (Odessa, Illychevik) as reported in the Inception Report, and hopefully before Turkmenbashi in the near future.

In view of the differences of information and data, and particularly the lack of information for Baku and Turkmenbashi, it is too early to release a complete technical file on all MoS relevant ports of beneficiary Countries, which will be done whenall data collection and analyses are completed.

Contents of this future file is aiming at providing information and arguments to further elaborate on the capacities of these ports to be potentially linked by MoS Pilot projects.

AZERBAIJAN

Baku

(See Google generated image)

- Current non-container

  - Bulk berth currently receiving 1 M. tons clinker (Iran)
  - Railway ferry: two berths operating to Aktau and Turkmenbashi
  - Ro-Ro: one berth operating to Aktau and Turkmenbashi

- Current container facilities

  - one berth operating to Aktau and Turkmenbashi
    Direct rail connection
    5 metre water depth
    2 luffing jib cranes 42 tonnes capacity, plus several smaller luffing jib cranes.

Project Baku International Trade Sea Port

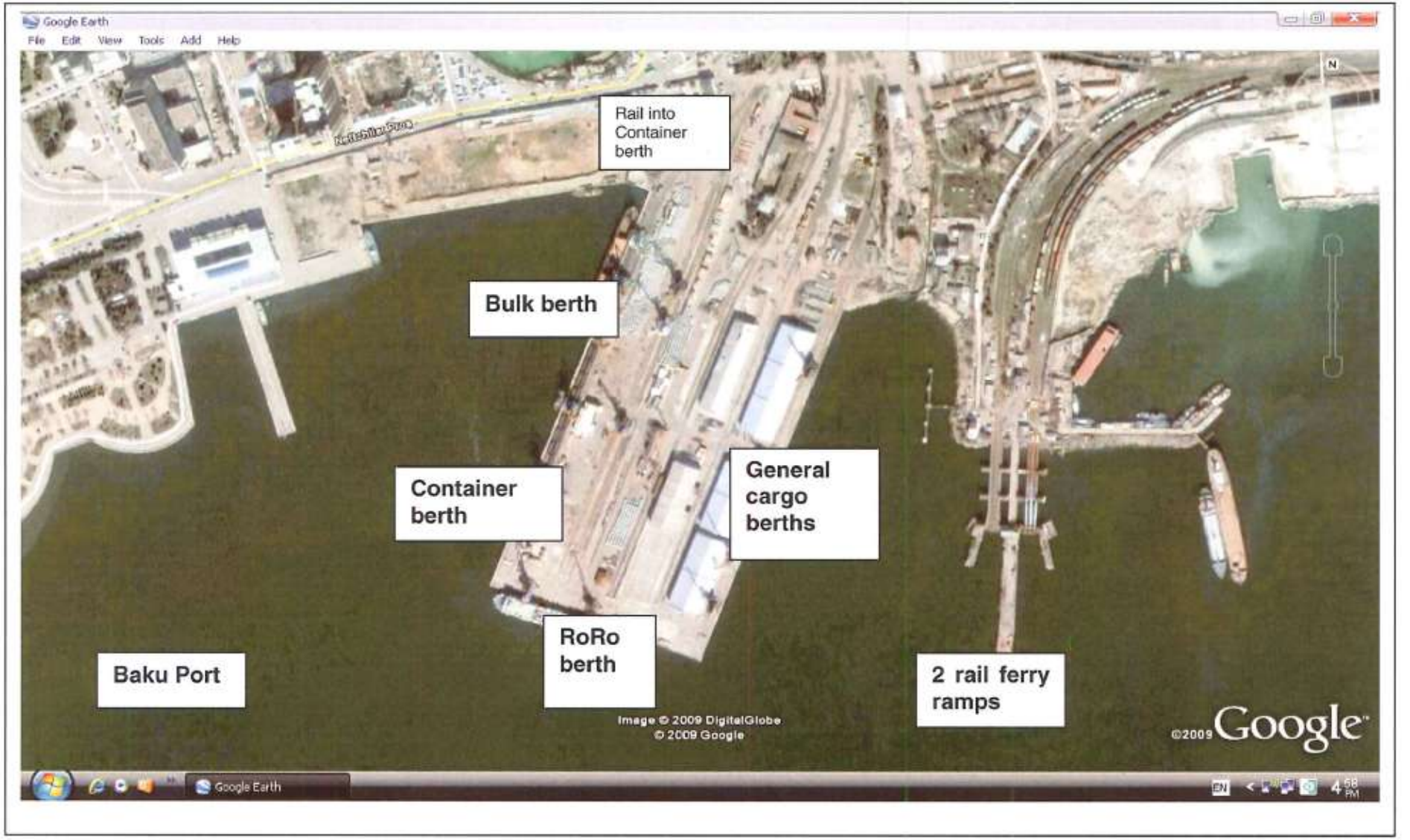
New port at Alyat (70 km south of Baku) being designed by Royal Haskoning.
Capable to accommodate 13,000 DWT vessels (i.e. largest vessels currently operating in the Caspian).
Alyat will be a multipurpose terminal for bulk general cargo and containers.

The plan is to build the port in three phases, with first phase due to commence at the end of 2009, subject to final decision yet to be confirmed by the government, and scheduled to be in operation in 2012.

Notes:

- The railway, Ro-Ro, container and multipurpose (general cargo) facilities will have to be looked at in a MoS perspective.

- Vthe vsit paid to Baku Port and operators on the occasion of the field trip along the Baku-Georgian ports corridor did not allow to obtain much information. It is planned to complete this with particular visits to operators.


Google Earth
File Edit View Tools Add Help
Rail into Container berth
Bulk berth
Container berth
General cargo berths
RoRo berth
Baku Port
2 rail ferry ramps
Image © 2009 DigitalGlobe
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Google Earth

GEORGIA

- **General**

According to Georgia stakeholders, the low traffic level is due to a combination of the global crisis and the perception of the political situation, whereas all war damages were repaired in September 2008.

- Road: The Country is currently upgrading roads linking Georgia with Azerbaijan and Armenia.

- Rail: There are plans for blocktrains from Poti to Tbilisi in the first place, thereafter up to Azerbaijan. It is considered also to build a railway bypass between Zestafoni and Khashuri, as the current railroad has strongly strong gradient.

- Procedures: New simplified border crossing procedures are expected to be implemented within three years.

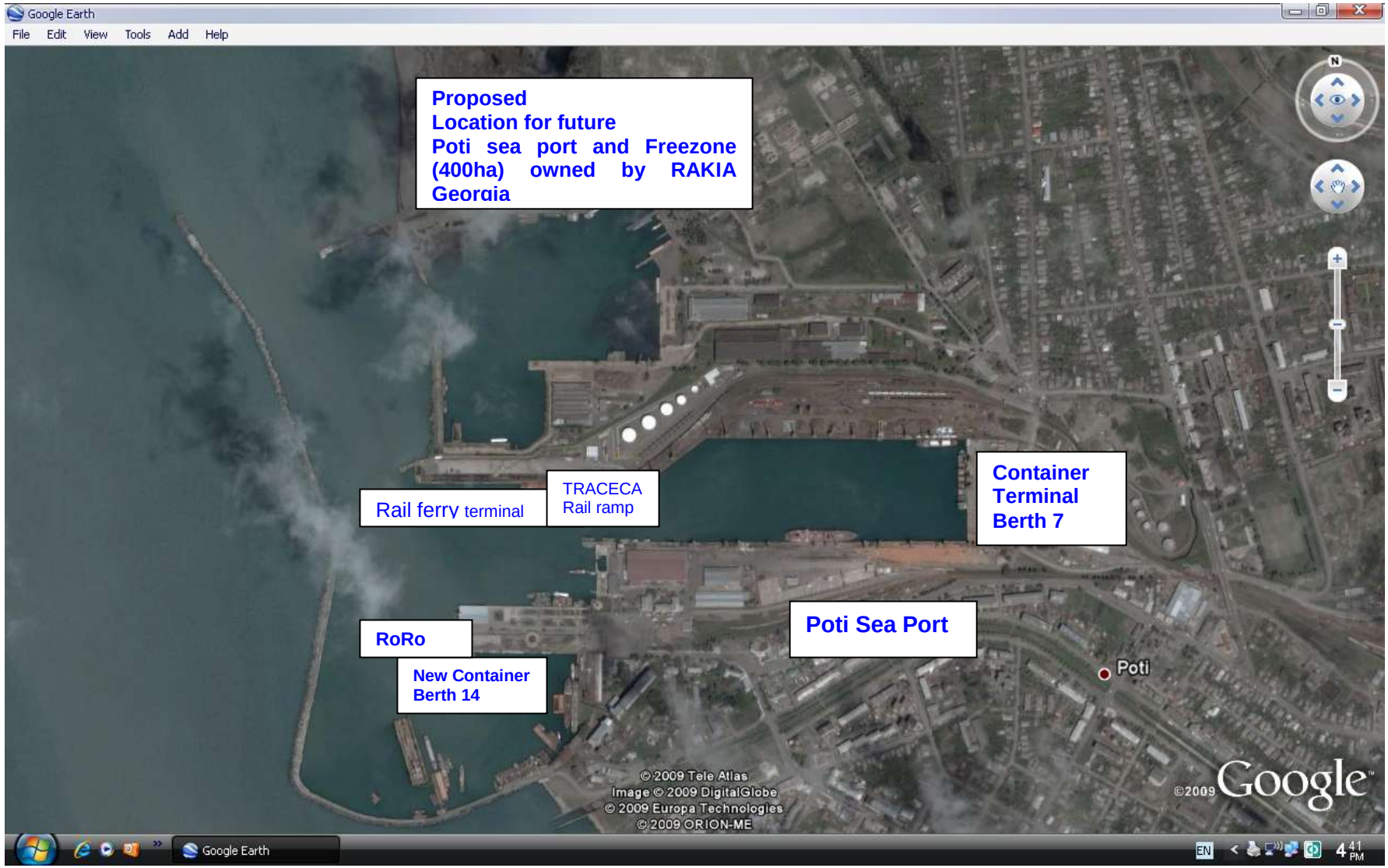
- Traffic:
  Poti port has 15% oil related traffic.
  Batumi port has 85% oil related traffic.
  Both ports are also involved in container, bulk and breakbulk traffics.

- Container: Several major container lines are active in Georgian ports, giving the country a worldwide coverage of destinations through feeder services via transhipment hubs.

- Ro-Ro / Railway: Poti and Batumi also have RO/RO-Railway ferry connections to Varna and Illichevsk, and there are discussions with Italy for a link with Trieste.

- **Poti Sea Port**
  (See Google generated image)

The port was designed to handle 5,5 Mio t. and actually handled 8 Mio t in 2008.
The port works 24/7, all year round (except Dec. 31 and Jan. 1st).


Google Earth
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Proposed Location for future Poti sea port and Freezone (400ha) owned by RAKIA Georgia
Rail ferry terminal
TRACECA Rail ramp
Container Terminal Berth 7
Poti Sea Port
RoRo
New Container Berth 14
Poti
© 2009 Tele Atlas
Image © 2009 DigitalGlobe
© 2009 Europa Technologies
© 2009 ORION-ME
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- Current non-container operation

- Bulk alumina to Tajikistan and aluminium ingots in return
- Railway ferries UKRFerries and Silk Line including a rail ramp financed by TRACECA

- Current container operations

Approximate market shares of container operators may be obtained for Poti port, which is not so frequent.

Container lines performances in 2008 (approx.):

MSC	40%
Maersk	25%
CMA-CGM	15%
Zim	10%
Hapag Lloyd	5%
China Shipping Container Line	5%

Total containers: 209 000 TEUs, considered to be close to maximum capacity.

Containers do not stay on-docks. Instead, they are drayed immediately to bonded off-dock terminals managed by the container lines.
Reefer plugs and off-dock warehouses are available on these off-dock facilities.

Poti Port started to receive containers loaded with Afghanistan-bound humanitarian (relief) and NATO non-armed cargo. Cargo arrives from Germany in Shipper's owned containers (SOC) and are on-carried by rail to Baku.
The Port has plans to attract more cargo to Central Asia and to become a Container hub to International Standard.

Container vessels are currently operated at berth N° 7, with a length of 211 m, water depth to accommodate vessels with a draft of 8.5 m and maximum length of 165 m.

In order to cope with trade growth, development works have just started at berth N° 14 with:

- dredging works in progress during at the time of the visit.
- designed serve as a temporary container berth for next 4 years, until the planned new container terminal becomes operational in 2013, and reverting to bulk and general cargo operations after.
- two new Gottwald mobile harbour cranes equipped with container spreaders have been ordered.
- the berth will be able to accommodate container vessels of 1,000 TEU, which has been confirmed as sufficient currently by the various container lines calling Poti.

New Poti Port and Free Industrial Zone
RAKIA (Ras Al Khaimah Investment Authority) signed a 49 year concession in 2008 to upgrade and develop the port. A new 100 ha port (to the north of the existing port) and 300 ha Free Industrial Zone (FIZ) will be built over the next five years.
Phase 1 of the new port is scheduled for construction from 2010 through 2012 and to be operational in 2013.

The new facility will have:
- 600 metres berth length
- 17 metres (potential) water depth
- it will be able to accommodate container vessels up to 5,000 TEU

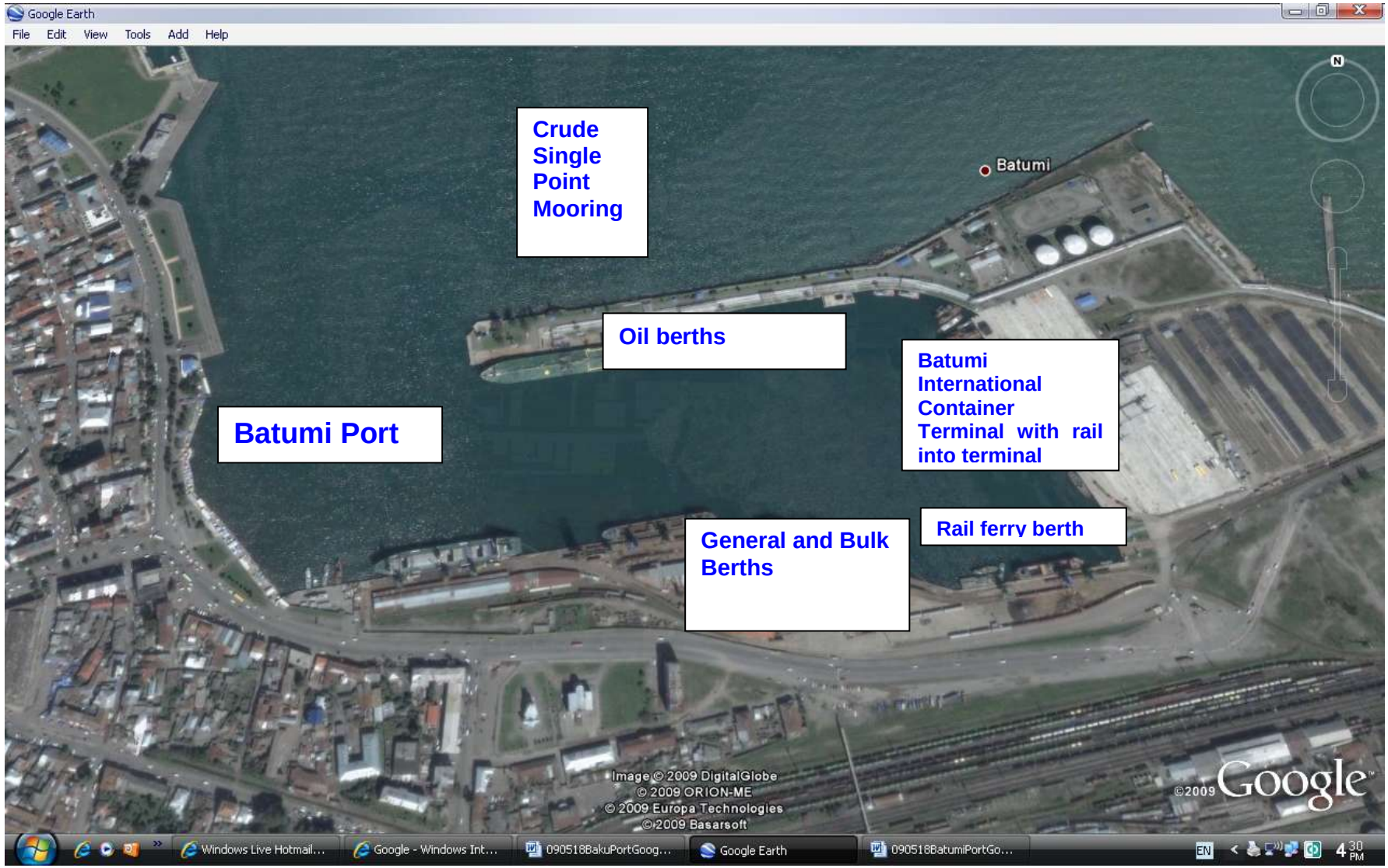
Poti FIZ

The FIZ will have tax exemptions
- from profit and property tax as well as VAT.
- of customs duties for exports or national sales.

- ***Batumi Port***
  (See Google generated image)

Batumi Port is now owned by Kaz Trans Oil, a Kazakhstan-based group, comprising three specialised companies:

- Batumi Oil Terminal Limited
- Batumi Seaport Limited
- Petrotrans Ltd


Google Earth
File Edit View Tools Add Help
Crude Single Point Mooring
Batumi
Oil berths
Batumi International Container Terminal with rail into terminal
Batumi Port
Rail ferry berth
General and Bulk Berths
Image © 2009 DigitalGlobe
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Current non-container operation
Crude oil = 85% of traffic.

Other operations (non-containerised)
Bulk Sugar
Grain, with a new grain terminal being planned for Kazakh grain exports
Aluminium Phosphate
Metal scrap
Construction materials
Coal and manganese

Other potential traffics
Cotton from Uzbekistan now moving through Bandar Abbas and Riga
Grain for the planned terminal

Current container operation
Containers are a minor part of Batumi's business, with 90% of all container trades moving through Poti.

Batumi International Container Terminal LCC (BICTL), a member of Manila-based ICTSI Group.

- BICTL was granted a 48 year lease contract in 2007 to develop a new container terminal, a railway ferry bridge and dry bulk general cargo facilities.

- Container operations started in March 2008.
  The container berth (berths 4 and 5) has a length of 284 m at a depth of 10 m, to be dredged to 11,7 m.
  Terminal current annual capacity: 100,000 TEUs on 13,6 ha, 11,3 of which for container activities, and with spare space available for further extension.
  Plans include a stripping area for containerised second hand cars.
  The yard stacking area is currently designed for reachstacker operations, to be possibly converted to rubber tyred gantry (RTG) operations should the need arise for higher stacking capacity.

Equipment acquired by BICTL:
- 2 Gottwald HMK260E mobile harbour cranes with telescopic container spreaders. Average productivity of cranes 16 moves per gross crane hour, considered very good by industry standards.
- 5 reachstackers
- 2 side lifters
- 6 terminal tractors
- 14 container chassis
- 6 forklifts (3 to 16 tons)

Railway ferry connections with Varna and Illichevsk:
the terminal has two railway lines which can each accommodate 20 rail wagons.

Security:
A private security force (LLC Delta 007) provides full 24/7 security to the terminal.
A total of 16 CCTV cameras have been installed to monitor gate movements and cargo stripping activities, and are connected in real time with customs authorities in Tbilisi.

- IT equipments and solutions
  The terminal is equipped with Terminal Management Software SPINNAKER, composed of 5 modules: automated vessel planning, yard planning, gate entry/exit control, electronic data interchange (EDI), railway movement software.
  In-house programmes have been implemented for billing, vessel productivity monitoring, maintenance planning and spare parts management.

  Other facilities:
    - Bank office for payment of duties,
    - Brokers office,
    - Customs assessment and inspection offices,
    - BICT billing office for collection and issuance of gate pass.

- Other: BICTL has implemented an operational training programme for workforce.

Container trades

Batumi does not deal with containers of Georgian-bound cargoes nor of NATO non-armed cargo to Afghanistan, which are dealt with in Poti.
Batumi container traffic is transit cargo of mainly foodstuff and humanitarian aid (relief cargo), with:
60% to Azerbaijan
30% to Kazakhstan/Uzbekistan/Turkmenistan in SOCs
10% to Afghanistan in SOCs

KAZAKHSTAN

Aktau Port

(See Google generated image)

Aktau port is the main commercial seaport in Kazakhstan on the east coast of the Caspian Sea.
It connects Caspian ports of Baku, Mahachkalla (Russia) and the Iranian seaports.
In the summer Aktau receives imports of building materials and exports of steel scrap routed through the Volga/ Don canal, all carried in bulk/ breakbulk vessels.

90% of current export cargo is liquid bulk, predominantly crude oil.
The non oil related berths are for:

- Railferry terminal (with the TRACECA funded rail ferry ramp), with a capacity of 28 wagons per ferry
- General Cargo / Container berths.

A new port is being built in the Northern port with a breakwater already partially constructed, and planned berths as follows:

- 4 crude oil berths
- 3 general dry cargo/ container berths
- 2 potential grain berths

The Masterplan Traffic Forecasts* to and from Aktau are (1,000 t):

	2006	2010	2015	2020
Grain	118	400	1,000	1,250
Rail ferry Inbound (existing traffic)	148	259	417	613
Rail ferry Inbound (new city cargo)	0	330	330	330
Rail ferry outbound (fertilizers)	0	0	1,000	1,200
Containers (existing traffic)	10	51	154	310
Containers (new city traffic)	0	330	330	330

Source: Scott Wilson

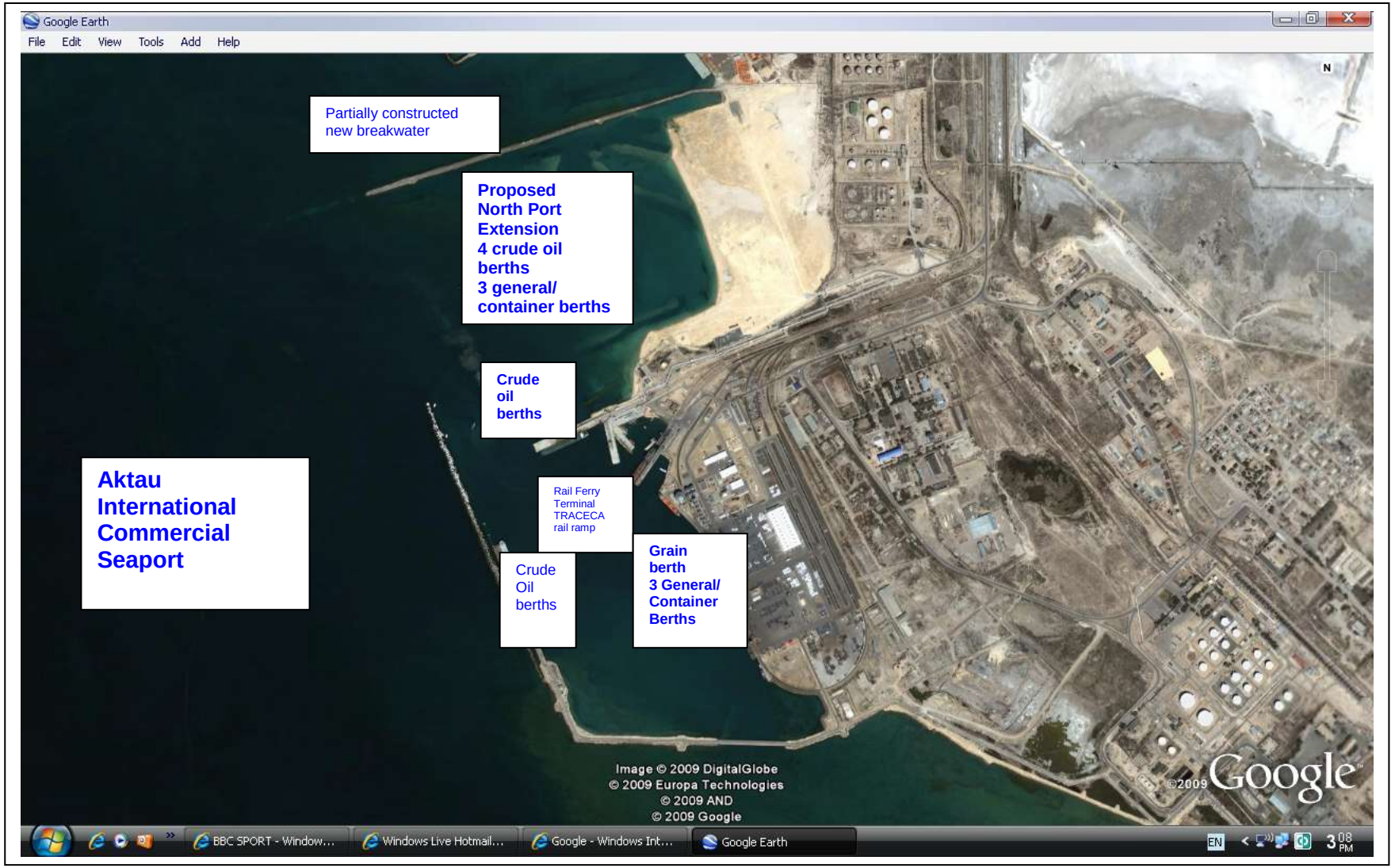
The potential JV between Aktau International Sea Commercial Port and Dubai Ports World to operate the non liquid bulk traffic in and out of Aktau could provide a significant catalyst to opening up the East Black Sea and Caspian sea link along the Poti – Baku trans Caucasus corridor. This potential JV is understood to be at least stalled as AISCP and DPW have failed to come to a bilateral agreement.
Ferries and container vessels are generally considered in Aktau to be offering inadequate and uncompetitive services, and practical measures would be considered to rectify this shortfall.

Project: Aktau International Sea Commercial Port

The national transport plans are to establish a forwarding and logistics center in Aktau port with the objective to reach an additional growth of freight up to 30% per annum, and increase transit flows for 1.5 to 2 million tonnes detailed as follows in the AISCP prospectus and study (forecasts 2009 in M. tons).

- Oil 10,200
- Kazakh Steel products (coil and ingots) 0,900
- Grain 0,080
- Other (including steel scrap) 0,200
- Ferry cargoes 0,250

TOTAL..... 11,630 M.t


Google Earth
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Partially constructed new breakwater
Proposed North Port Extension 4 crude oil berths 3 general/ container berths
Crude oil berths
Aktau International Commercial Seaport
Rail Ferry Terminal TRACECA rail ramp
Crude Oil berths
Grain berth 3 General/ Container Berths
Image © 2009 DigitalGlobe
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3.2.2 Railway

The Railway organisation and the network infrastructures of each country involved in the project is briefly described below. The sources of data are *Jane's World Railways 2008-2009* and information directly collected by the Consultant, including observations made during the field visit along the Azerbaidjan (Baku) – Georgian ports corridor.

The following is a synthesis of the base elements that are determinant for the environment of the railways operations and for intermodal developments. Detailed technicalities collected by experts are not mentioned here.

AZERBAIJAN

Azerbaijani Railways (ADDY) comprises three operational divisions based in Baku, Gyandzha and Nakhichevan, overseen by ADDY's general management in Baku.
The network comprises 2,122 km of lines:

Total route length (km)	Gauge (mm)
2,122	1,520
Electrified lines (km)	Electrified system
1,278	3kV DC

There are two main lines (both double-track and electrified) extending from Baku: a northern line running along the Caspian coast to Makhachkala in Russia, the other line heading Alat before turning to Kurdamir, Yevlax and Agstafa before reaching Tbilisi in Georgia.

A third line, only partially electrified, follows the Iranian border to Naxcivan, from where it is linked to Iran at Culfa.

Much of the ADDY network has suffered from deferred investment. This is now in progress after several evaluations (30% of the east-west corridor to Georgia reported to need improvement in 2006) and World Bank proposals to give priority to the modernisation of this route, along with investments in traction fleet.

GEORGIA

A strategic development plan initiated in 2004 led to a restructuration of Georgian Railways as a state-owned joint stock company. The railway assets were transferred into the Georgian Railway LLC (government owned), which operates under the public law of the Enterprise Management Agency, part of the Ministry of Economic Development. It is in charge of both management and maintenance of rail infrastructure, passenger operations and freight services.

Following an attempt to privatise Georgian Railway LLC in January 2007 a public/private partnership was concluded with British private equity company Parkfield under a 99 year management agreement, under which Parkfield will have the concession to operate the network and will invest US$ 1 billion over a ten-year period.

The network comprises 1,575 km of lines:

Total route length (km)	Gauge (mm)
1,575	1,520
37	912
Electrified lines (km)	Electrified system
1,562	3kV DC

- The principal route is the electrified double-track from close to Northern Black Sea border via Sukhumi, Ochanchire, Samatredia, Zestafoni, Khashuri and Gori to Tbilisi where it divides.

- One line runs to Baku in Azerbaijan, the other to Yerevan in Armenia.

- Two sections depart from the main line and arrive in the ports of Batumi and Poti. The terrain is usually difficult and in particular the section Zestafoni-Khashuri with 2.8% gradient and tight radii (even 160m). Train weight are restricted to 2,500-3,000 tonnes with 3 locomotives.

- Two new lines are planned or in progress: the Arkhot connection across the Caucasus mauntains to Ordzhonkidze in Russia and, the new line between Kars and Tbilisi via Akhalkalaki to replace the existing line via Armenia. The project covers the rehabilitation of 190 km of existing line and the construction of 32 km of new line in Georgia, from Akhalkalaki to Turkish border.

KAZAKHSTAN

Since the reform of 2002 the Kazakhstan Sate Railways (KTZ) are a joint-stock company charged of the management and maintenance of rail infrastructure, as well as operations of passenger and freight services, and the state has retained ownership of infrastructure and rolling stocks.

KTZ is organised in five operating regions which have the status of state enterprises under the close supervision of Kazakhstan State Railways.
The network comprises 13,700 km of lines:

Total route length (km)	Gauge (mm)
13,700	1,520
Electrified lines (km)	Electrified system
3,700 *	25kV AC
* some sections are electrified at 3kV DC	

The Kazakhstan system has many single track long stretches, while over one third of the network is double track.

- The principal route is the 1,507 km Trans-Kazakhstan Railway running from Petropavlosk on the Trans-Siberian Railway through to Kokchetav, Astana and Solonichki to the Karaganda coalfield. This was later extended to Cho on the Turkestan-Siberian route, and Lugovoy where it connects with lines into Kyrgyzstan and Uzbekistan.

- The Turkestan-Siberian route runs 1,445 km from Semipalatinsk via Aktogay to Almaty and Chu. From Aktogay the line to the Chinese border at Dostyk now forms part of a route from Beijing to Russia. The Dostyk-Aktogai and transhipment facilities at the Chinese border were upgraded with a Japanese loan.

- A third main line (1,850 km) in the west of the country links Tashkent in Uzbekistan, with Orenburg in Russia, via Aralsk and Kandagach. This line is also connected to Aktau port from Kandagach via Beyneu.

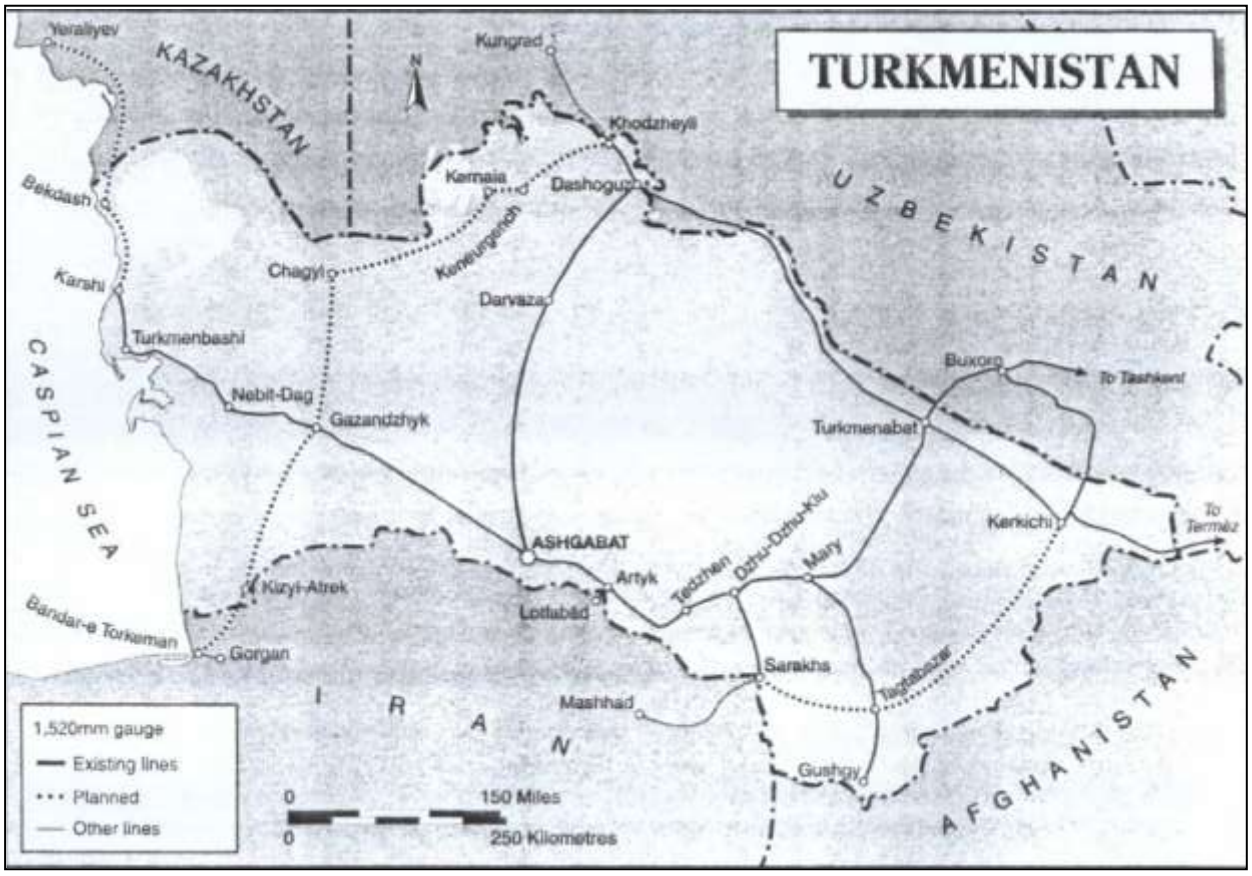
- Several new sections have been built to create a better adapted national Network for the domestic traffic.

- The construction of a 3,038 km standard-gauge railway (1,435 mm) to connect China with Aktau and western Europe would eliminate the necessity of transhipment to 1.520 mm vehicles at the China-Kazakh border.

TURKMENISTAN

Turkmenistan State Railways (TPK) is operating the national rail network, which comprises almost 3,000 km of lines:

Total route length (km)	Gauge (mm)
2,980	1,520
Electrified lines (km)	Electrified system



- All lines are single track and not electrified. The main route is the 1,141 km Trans-Caspian line linking the port of Turkmenbashi, the capital Ashgabat and Turkmenabat near the border with Uzbekistan.

- There is a branch line from Mary to Gushgy on the Afghan frontier, and another connecting this line to the Iranian network at Sarakhs.

- A 540 km long line was completed in 2006 from Ashgabat to Dashoguz across the Karakum desert.

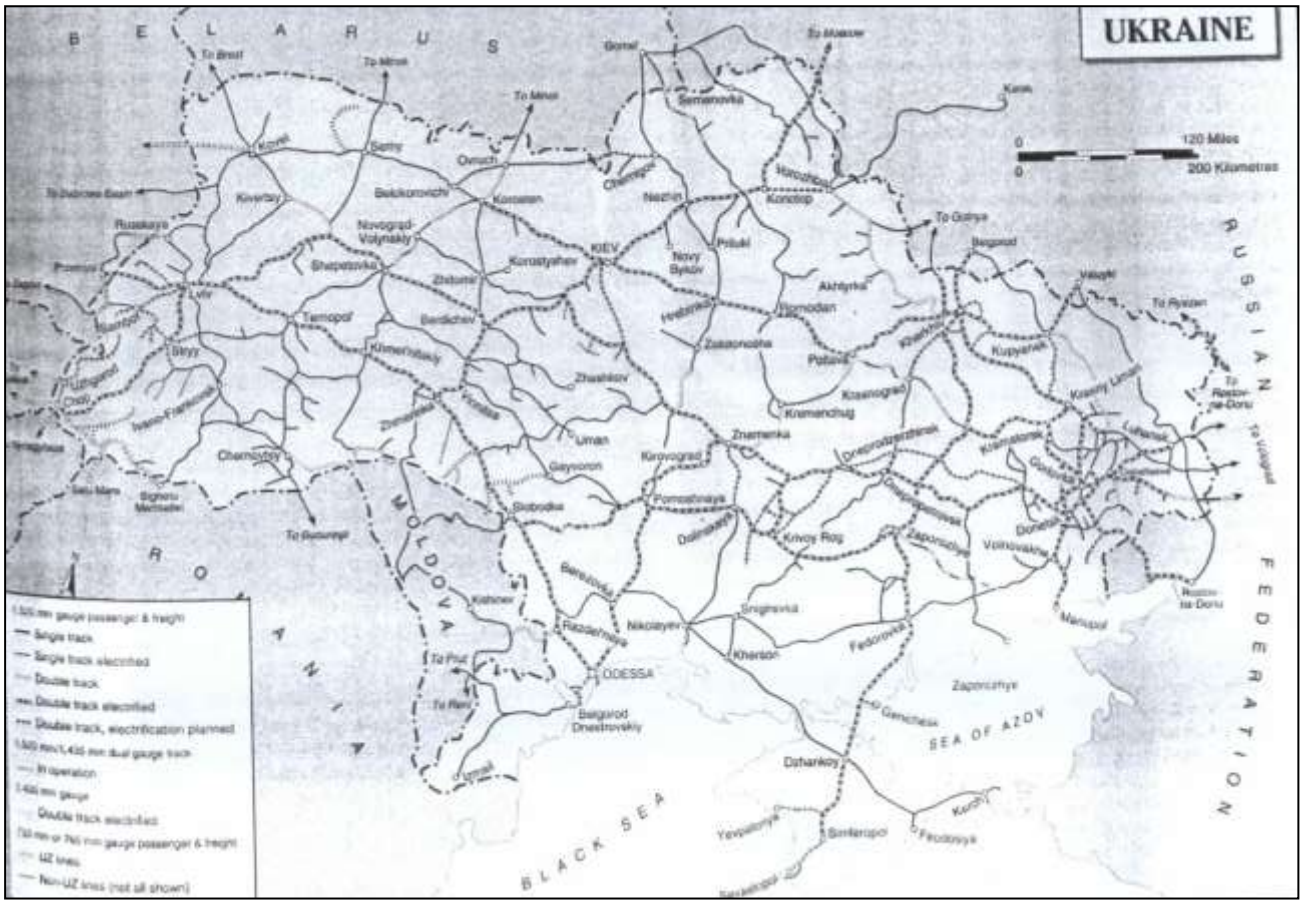
- Long term projects include a line north of Turkmenbashi along the Caspian coast to Kazakhstan.

UKRAINE

Ukrainian Railways (UZ) is the State company in charge of the sector. The headquarter is in Kiev and it consists of 6 railway administrations: Donetsk, Lviv, Odessa, Dnepr, South West and Southern railways.

The network comprises 22,000 km of lines:

Total route length (km)	Gauge (mm)
22,001 *	1,520
Electrified lines (km)	Electrified system
4,320	25kV AC - 50 Hz
4,930	3kV DC
* 200 km of 1,435 mm gauge track	



Three of the seven neighbouring Countries of Ukraine (Russian Federation, Belarus and Moldova) have 1,520 gauge lines, and there are few short cross-border 1,520 mm gauge lines. Most freight is transhipped to standard (1,435) gauge when passing to and from Polish, Slovakian, Hungarian and Romanian railways.
Some 41% of the network is electrified, divided almost equally between 25kV AC and 3kV DC.

Ukraine at the cross ways of three Pan-European Corridors linked with the Black Sea: Corridor III (Brussels - Kiev), Corridor V (East-West: Venice - Kiev) sharing the same route from Lviv to Kiev, and Corridor IX (Helsinki - Kiev - Ljubashevka/Rozdilna (Ukraine) - Alexandroupolis, with a branch from Ljubashevka/Rozdilna to Odessa).

3.2.3 Inland waterways

The Inland Waterways (IW) project component were developed in April – May 2009, following the issuance of the Inception Report and the acceptance of specific ToRs for major project results, starting with an assessment and analysis of the situation before exploring the possibilities of MoS-type solutions including I.W. and maritime transport during field mission to come.

The following are brief preliminary findings resulting from the review of relevant studies and other sources.

The attached maps of the Black Sea and Caspian Sea region show identified IW sections for the project: the Danube, the Dnepr and the Volga-Don Complex.


BELARUS
Pripet
Saratov
Kiev
UKRAINE
Voronezh
Dnepr
Dnipropetrovsk
Volgograd
KAZAKHSTAN
MOLDOVA
Rostov-na-Donu
Atyrau
Kishinev
Odessa
ROMANIA
Volga-Don canal
Astrakhan
Sea of Azov
RUSSIA
Bucharest
Aral Sea
Novorossiisk
Danube
Constanta
Sebastopol
Sotchi
Grosny
Aktau
Black Sea
BULGARIA
Varna
GEORGIA
Makhachkala
Zaliv Kara-Bogaz Gol
Bourgas
Poti
Tbilisi
Sofia
Batumi
USBEKISTAN
Istanbul
Filyos
Samsun
Trabzon
AZERBAIJAN
Baku
Yerevan
Turmenbashi
ARMENIA
Ankara
TURKMENISTAN
Athens
TURKEY
Van Gölü
Ashkhabad
Mersin
IRAN
Nicosia
SYRIA
IRAQ
Teheran
0
250
500 km
Map of Black Sea and Caspian Sea Region

The Danube

As the longest European river (2,900 km) and together with the Rhine and Main the Danube is a key artery of the IW system between the North Sea (Rotterdam) and the Black Sea with the following features in its lower part:

- The large estuarial delta with its northern branch forming the border between Ukraine and Romania and the large capacity canal connected to Sulina on the Black Sea, can accommodate sea-going vessels with a draught of 6.5m, carrying up to 25,000 tons on the section from Sulina to Galati/Braila, over a distance of 180km.
  So far this section mainly serves the industrial region of Galati/Braila. The recently-opened Bystroye branch facilitates communication between the open sea, and the Ukrainian part of the Danube, with reported draught of 4.5m.
  Ukraine holds ports on the Danube, close to the river mouth: Ismail, Reni and Ust-Dunaysk.

- Upstream Galati/Braila, a section whose navigation is restricted to river-going units with maximum draught of 2.5m but a number of shallows with depths below 2m in summertime. The first dams and locks are found in the Romanian-Serbian part of the river, namely the Iron Gates, allowing passage of 18,000 DWT convoys with a draught of 3.5m, each lock being 340m long and 25m wide.

- An artificial canal linking the Danube in Cernavoda to the port of Constanta, with locks at each end, each unit lock being 340m long, 25m wide and 3.5m deep – in consistency with the Iron Gates facilities, which is adequate for long distance haulage. The port of Constanta has a new barge terminal designed for achieving transhipment up to 20 Mt per annum on the Constanta-Danube IW link. In year 2008, out of a total of 62 Mt for Constanta, the IW component was close to 14 Mt. This canal and the port promoting this gateway for trade between the Black Sea region and Central Europe.

Traffic has been constantly growing in the last decade, and it mainly consists of bulk material, while containers movements are still on the low side.

Constant efforts aimed at improving navigation conditions on the lower Danube have been developed with the assistance of the EU for upgrading the Sulina canal, eliminating shoals between Calarasi/Silistra and Braila implementing a modern VTMIS, building a barge terminal in Constanta, re-building high bridges in Novi-Sad, Serbia, providing technical assistance etc.

The following markets in Central and Western Europe may boost traffic on the lower Danube:

- Steel and metallurgical sectors in Hungary, Slovakia and Austria, which also can use the Danube to import iron ore from Ukraine and to export steel products towards the Middle East and the Far East.
- Grain, cereals and other agricultural products to be exported from Hungary (and possibly traded with other Black Sea Countries).
- Chemical sectors, including phosphates and other fertilizers.
- Various manufactured products from Germany.

Besides, riparian countries are all members of the Danube Commission, which constitutes an additional asset for revitalizing and modernizing navigation on the Danube.

Map for the lower Danube

The Dnepr

As shown by attached map, in the Ukraine the Dnepr is a succession of six large reservoirs controlled by dams equipped with locks: the Kakhovsky, the Zaporozhsky, the Dneprodzerzhynsky, the Kremenchugsky, the Kanevsky and the Kievsky. From Kiev to the Black Sea at Kherson over a length of 825km the Dnepr is a class Vb waterway with improved characteristics at the maximum dimensions of locks is 270m by 18m with a draught of 3.65m. This depth is the one ensured on the major part of the section except over the Dneprozherjinsk-Dnepropetrovsk stretch where during the dry season it can decrease to 3m. Air clearance is limited at 12m at the Cherkassi bridge, which is fair enough even for river-sea vessels.

Upstream Kiev the Dnepr is still a large navigable river up to Pripiat, the Kiev lock being 150m by 18m. Further up and to the Belarus border the river reverts back to free flow, with numerous shoals.

The Dnepr estuary, or “liman”, joins the Bug estuary and connects both rivers. The Nikolajev-Kherson route in this zone represents a 90km channel that has maritime characteristics. However there is no deepwater port in the Dnepr estuary; therefore, to catch transhipment cargo towards the Dnepr vessels must be able to sail in the open sea from Odessa ports to the river mouth, on a distance of 50 nautical miles.

Cargo traffic on the Dnepr is in the magnitude of 10 to 20 Mt per annum, depending on the year. Ukrrechflot still owns a number of river units (close to 200 vessels). A member of the Black Sea Ship Owner Association, the company endeavours upgrading and renewing its fleet. A dozen of new dry cargo units have been purchased by the Company since 2000 in the last few years. Its river vessels up to 2,000 DWT reach Kiev.

During his visits in Ukraine planned for July and August 2009 the Consultant shall update his information on the Dnepr river, its fairways, dams and locks, fleets and traffic figures with a special focus on possible river-sea routes. Special attention will also be given to the Zaporozhsky locks, which are apparently out of order (these locks, with water head of 40m, are reportedly awaiting funds for repair works). Meetings shall be arranged with the Ministry of Transport, with Ukrrechflot and other possible companies likely to commit in river-sea transportation. The Consultant shall also meet Rechstranspoekt Institute, in Kiev. Lastly these visits will allow discussions/updates on navigation on the lower Danube, as part of it is controlled by the Ukraine.

Map for the Dnepr river

The Volga-Don Complex

"Volga-Don Complex" means here the inland waterway system linking the Caspian Sea to the Black Sea. As shown on the map, it comprises:

- The lower part of the Volga river, from Astrakhan to Volgograd, over a distance of 540km. This free-flow stretch can accommodate river-sea vessels of relatively large scale, up to 290m long.

- The artificial canal linking the Volga to the Don river, over a length of 101km. This canal has 13 locks which can raise ships on 88m on the Volga slope and lower ships on 44m on the Don slope. Dimensions of canal locks limit vessels to 140m in length, 16m in beam and 3.5m in draught, equivalent to 5,000 DWT. Dimensions of these locks have governed tonnages of several new vessels operating on the Caspian Sea, produced in Mediterranean shipyards.

- The Don river down to the Sea of Azov.

Types of cargoes transported via the Volga-Don mainly include coal, minerals construction material and grain. Recent cargo volumes stood at 12 Mt per year.

Unlike the Danube or the Dnepr, the Volga-Don Complex could not be considered as part of Traceca so far. However, like the Traceca Caucasus Corridor it links the Caspian Sea to the Black Sea and therefore its capacity and performances should not be ignored. In addition, at the very beginning of 2009 the EurAsian Development Bank launched a feasibility study for improving this IW link, under ambitious headlines (*"A Canal to link the Caspian Sea to the World"*).

The Consultant could not collect information on the progress of the above project yet, with the exception of some general public announcements, and it will be appreciated to receive the assistance of the Traceca network in liaison with project representatives.


Map for the Volga-Don Complex
0
250
500km
Voronezh
Don
Proposed New Volga-Don Canal (on-going studies)
Dnepr
Dnipropetrovsk
Tsimiansk
Reservoir
Volgograd
Rostov-na-Donu
Volgodonsk
Free flow
Volga
Atyrau
Volga-Don canal
(existing canal with 13 locks)
Astrakhan
Sea of
Azov
RUSSIA
Novorossiisk
Sebastopol
Sotchi
Grosny
Aktau
Black Sea
GEORGIA
Makhachkala
Poti
Batumi
Tbilisi
Zaliv
Boga
Trabzon
Filyos
Samsun
Caspian Sea

3.2.4 Intermodal: elements on the central corridor

These are provisional elements for consideration on the Azerbaijan (Baku) – Georgia (Poti – Batumi) corridor (see following map)

- **Cargo flows indicators (May 2009)**

  - The downturn of transit movements is estimated by local stakeholders to be in the region of minimum 50% over comparable periods in year 2008

  - The split observed between container and non-container flows is in the range of:

    - 60 – 70% conventional long haul
    - 30 – 40% containers

  - Approximate nationality shares:

    - 50% Turkey
    - 30% Georgia
    - 20% Azerbaijan and others

- **Road condition (May 2009)**

  Azerbaijan and Georgia are currently carrying out important road improvement works.

  - **Azerbaijan**

    Extensive road reconstruction and widening works are underway. Once the works are completed, Baku will be connected to the Georgian border with a dual carriageway (2 lanes each way).
    By-passes are/will be built in order to avoid road traffic to cross the main cities. The Tovuz bypass is being completed, and Ganja bypass construction is about to start.

  - **Border crossing at the "Red Bridge" checkpoint**

    On the Azerbaijan side, a modern border-crossing building is under construction.
    The Georgian side has adequate Customs and immigration facilities.

  - **Georgia**

    A large portion of the road between the Red Bridge and Poti/Batumi has already been renovated.
    A road bypass is to be constructed around Tbilisi. The works are to start as soon as the funds are received from the World Bank.
    A motorway is under construction between Batumi and the Rioki tunnel (abt. 220 km).
    Other modernisation works are currently carried out on the roads connecting Georgia with Armenia and Georgia with Azerbaijan (Northern route via Lagodekhi).

- **Railways systems: general considerations**

The following remarks are valid for all TRACECA Countries and Railways networks, and more particularly relevant for the existing or potential Rail ferries links between the ports connecting the central axis both Western (Black Sea) ports and Eastern (Caspian Sea) ports.

With regard to the railway networks described and, in the framework of the corridor links, the following main conclusions should be taken into consideration:

- The need for consistency between international agreements (i.e. AGTC, AGC…) and reference documents used by infrastructure managers.

- The necessity of maintaining the existing common standards in CIS countries for the infrastructure with the only exception of the technological part of the railway system where new standards should be carefully examined and agreed between concerned parties, considering the interoperability with European standards.

- The lack of maintenance and renewal of railway infrastructure and rolling stock.

- Due to the different track gauges used in the countries involved in the Study, it is necessary to give priority to gauge interchange points.

- The necessity to have not only a coherent investment programme, but also an adequate logistical approach.

- **Containers: current situation (May 2009)**

Containerised cargoes are on-carried by road or by rail between Georgia, Azerbaijan and Armenia, but shipping lines are not allowing (or exceptionally accepting) their containers to be on-carried to Central Asia, reasons given being:

- Lack of reliable tracking of their equipment there
- high repositioning costs of empty containers, which also results in the absence of Westbound cargo in containers beyond Baku.

Shippers have two options:

- cargo arrives to Georgian port in lines' (carriers), containers: it is discharged, stored, stripped and reloaded into conventional trailers or covered railcars. Operators indicate that this solution is very seldom used.
- shippers stuff their cargoes into their own containers (merchants) from place of origin to final destination.

The current Container/ Rail/ RoRo throughput along the Caucasus corridor is much less than it could and should be due to the present barriers and low competitiveness of the Poti – Baku – Aktau/ Turkmenbashi routes.
Shipping companies serving Poti / Batumi are reporting to receive frequent enquiries about the Caucasus corridor but their agents are failing to offer commercially workable conditions and / or to meet their requirements adequately or timely (long quotation delays).

Local stakeholders consider that the TRACECA corridor is currently negatively affected by too many links in the chain, unpredictable tariffs and subsequent complexity and uncompetitiveness.

The cost of container cargo routed to Kazakhstan from Rotterdam via Odessa and Russian rail is reported to be approximately 30% to 35% cheaper and faster than via the TRACECA Caucasus corridor.

3.3 Legal / regulatory issues

Out of the core issues for the legal and regulatory environment - beyond International Conventions applicable to each transport mode and as discussed at the Kiev workshop - is the need of common legal framework and instruments. The analysis and debate came just before the signature of the regional Convention on Multimodal Transport, which was analysed by the legal expert when the document was made available (A).

In parallel, progresses on procedures will be another major issue for the next period. Although it was not addressed specifically, some interesting findings were already made, particularly on the occasion of a visit to the Customs Control Committee in Astana as summarised below (B).

A. Multimodal Convention

- **Abstract conclusions of Kiev Workshop on Regional Transport Agreement**

  It was mentioned that two conventions (on multimodal transport and on forwarding activities) should be signed by TRACECA Countries on June 15-16, 2009. These two framework documents will set roles and assign responsibilities for the transport participants.
  These legal instruments to be applied in the future are raising great expectations for the development of intermodal and MoS transport solutions since not all beneficiary Countries have joined international conventions.
  Depending on the implementation agenda, practical steps could be retained meantime for MoS projects.
  On the main legal issues during this interim period has been the signature by many Traceca countries (including two beneficiary countries plus Ukraine soon) of the Agreement on Multimodal Transport on the 16th June 2009 during the Traceca IGC in the Kyrgyz Republic. A resume of its main content is proposed in the following synopsis:

- **Synopsis about TRACECA Agreement on Multimodal Transport, 16th June, 2009**

  - The Agreement will apply only for Countries who had signed TRACECA the Multilateral Agreement (MLA) and on their territory
  - Common base definitions used such as:
    - Multimodal Transportation (MT)
    - Agreement of MT
    - Document of MT
    - Operator of MT, Carrier; Shipper, Consignee; Delivery, Special Drawing Rights, Cargo, Modes of Transport
    - (See also Glossary in the report).

  - Multimodal operator is fully liable for the whole multimodal transportation and for all risks:

    - 30 days of cargo delay is considered as loss
    - in the absence of value declaration the compensation accounts up to 8,33 SDRs (Special Drawing Rights) per gross kg
    - penalties for late delivery are up to 5% of transport fees per day. Total penalty must not exceeded 30% of transport fees in accordance to the multimodal transport agreement.

- Article No. 4 identifies all information that must be contained in the multimodal transport document specific form will drawn up by TRACECA PS later.

- Multimodal transport operators can hold cargo until receiving whole payment for transportation.

- Shipper is responsible for doubtful information concerning cargo and pay damages in case of misdeclaration.

- One year limitation of action under the Agreement.

Until a single form of document for multimodal transport is approved it is possible to use any document under mutual agreement both in reverse or non reverse form (e.g. Bill of lading, Consignment note or other legal doc).

Authorized representatives from five (5) Countries signed the Agreement during TRACECA IGC meeting in Kyrgyzstan: Azerbaijan, Armenia, Georgia, Kyrgyz Republic and Tajikistan. The Agreement will enter into force when at least four (4) Countries have sent to PS their official approval in accordance with their national procedures.

B. Customs controls
Specific customs procedures: the case of road transport control in Kazakhstan

The Head and officers of the Custom Control Committee of Kazakhstan in Astana received the consultants and organised a visit of the Central Control rooms and described their mission and organisation (week 18).

The Customs advanced system and high level human and equipment resources, are dedicated to the control and monitoring of road transport at Kazakhstan border checkpoints, as designed for the follow up of trucks and trailers carrying imports, exports and transit cargoes.

The system does not supply statistical data for transit flows using the corridors that are actually or might be potentially competing with the "Aktau" / Baku central axis, and which would have been most useful for the future market studies of Pilot Projects.

Its extension has not been envisaged so far for the maritime links between national ports and other Caspian ports (nor for the inland navigation link between Caspian and Black Seas).

In spite of this, it is worth noting that the system demonstrates the possibility of technical solution packages that could be replicated for the maritime intermodal / border-crossing.

More particularly, the following are considered as interacting solutions and practices:

- Customs Authorities have agreed and / or are negotiating with other national Administrations in order to accomplish their own border crossing procedures and formalities, and this should alleviate substantially the number and delays of transit procedures;
- The Customs Control department is associated in reflexion on the "Single Windows" systems and solutions, including at an international level (SW Seminar in Morocco, April 2009).

3.4 Barriers

During the Workshop in Kiev, participants retained the term "barrier" in lieu of "bottleneck" or "obstacle".

The main barriers identified by participants were said to be:

- lack of intermodal transport coordination along the chain, f.i. communication between land and maritime transport
- Customs and non-customs border-crossing, procedures and controls
- Tariff levels and structures for most segments of the chain
- weaknesses of legal instruments between Countries and modes and for intermodal transport at national and regional levels (roles and responsibilities of all parties in the transport cycle).

The approach and experience of the Mediterranean MoS pilot projects dealt precisely and in details with these barriers in the same fields.
It was concluded similarly that MoS pilots for the region would require progresses in both “hard” (operations) and “soft” (procedures) fields.

The work on pilots has started from the identification of existing barriers and it would progress with a reduce or to solve these.

So far project experts did not notice major infrastructural barriers in a short term perspective (particularly in the current situation of low traffic), but rather more constraints in operations and organisations. Therefore, the existing TRACECA routes cannot be considered as the main factors restricting traffic development in the region, when taking also into consideration the steps and plans taken by Governments to develop ports and container terminals, and upgrade roads or railways.

Parallel actions should be precised and recommended for the “soft” side: organisation, operations, transit / border-crossing processes in order to progress towards efficient door-to-door solutions.

The suggestion to progress using a cooperative and information method was retained; it started with in-depth identifications of barriers and possible solutions. The process was launched after the workshop with some test cases being made in synthetic technical notes with the following contents:

- identification of barrier fields. Ex: legal, technical, commercial
- consequences / impacts. Ex: overtimes, extra-costs
- possible (feasible) solutions or proposals
    . short, medium, long term
    . suggestion coming from?
- concerned stakeholders, decision makers concerned by solutions
- actions to be taken. Ex: contacts, further approach, "ad hoc" groups
- tentative planning and periodic update

Some examples of barriers to MoS project developments have been identified as such during this first interim phase and this exercise will be carried on systematically. The case technical fiches below are related to legal and custom fields in Ukraine and quoted hereafter as examples.
The following is a list of the fields of barriers:

Barriers : List of fields

- Infrastructure and equipment facilities
- Operations and services
    - Maritime transport
    - Ports – Sub-fields (examples)
        - Handling
        - Terminal yard, storage
        - Cost / prices
    - Land transport (road, rail, inland navigation)
- Intermodal
    - Operations: interoperability
    - Laws and regulation
- Procedures
    - Port / border crossing
        - Customs
        - Non customs
    - Inland
- Market conditions
    - Costs and prices / tariffs
    - Competition (non maritime)

TECHNICAL FICHE N°1

Date / Rev. 2009.06.16

FIELD / SECTOR: **Legal** Sub-sector: **Transhipment / Ukraine**

DESCRIPTION

Transhipment is a special regime for transit container cargos transporting by sea. During the T/S, containers remain in the same Custom area or the port zone.

Custom formalities are proceeded without submission of the Freight Customs Declaration and without application of the delivery guarantee.

Regulation of the Cabinet of Ministries of Ukraine No. 320 of 2 April 2009 on the application of "Free practice" for container cargoes is in accordance with Convention on Facilitation of International Maritime Traffic (FAL) 1965.

It is also possible to apply the "transshipment" regime for non-excise cargos and only under the preliminary notification.

Port Authorities state that "transshipment" procedures are not working satisfactorily.

National Official procedure imply adoption of appropriate amendments to the Law " on Freights Transit".

IMPACTS (positive if matter solved)

Simplification of handling procedures for container transport.

Attracting new traffic.

Increasing handling volumes.

Good practices / recommendations

Positive experience of Constanta (Romania) port and Novorossiysk (Russia).

To carry into effect appropriate amendments to the Law "Freights Transit".

To improve Technology Scheme in ports accordingly.

Stakeholders concerned

Ministry of Transport and Communications (lead initiative)

State Custom Service; Ports authorities.

Actions

Coordination meeting with stakeholders.

Push amendments to the Law "Freights Transit" concerning "transshipment".

TECHNICAL FICHE N°2

Date / Rev. 2009.06.19

FIELD / SECTOR: **Custom** Sub-sector: **Customs control / in Ukraine**

DESCRIPTION

There are seven (7) checking services in Ukraine:
1. State Frontier Service of Ukraine (persons control/immigration control);
2. State Customs Service of Ukraine
3. Port authorities under the Ministry of Transport and Communications of Ukraine;
4. Ministry of Agrarian Policy (herbal control, veterinary)
5. Ministry of Environmental Protection (radiological control)
6. Ministry of Health
7. Ministry of Culture and Tourism of Ukraine (antiques, valuables).

IMPACTS (negative)

In spite of using "Single office" principle there are significant time delays during checking procedures.

Good practices / recommendations

European experience of checking procedures.
To delegate several controls to the main state administrations in Republic of Kazakhstan.
To delegate controls to authorised state administrations acting on behalf and for account of others.

Stakeholders concerned

All ministries involved, State Departments and authorities.

Actions

Mutual preparation of Technological Scheme approved by Government.

TECHNICAL FICHE N°3

Date / Rev. 2009.06.22
FIELD / SECTOR: **Customs** Sub-sector: **Port operations / Ukraine**
DESCRIPTION All required Customs procedures are performed on the port territory, both for transit and import. Relocating containers needs time and space, and this leads to traffic jams on the territory of the port. It is possible to improve traffic in the port without additional road and railway interchanges.
IMPACTS (negative) Traffic congestion in ports increases cargo handling delays. Restrictive consequence for the increase of port operations.
Good practices / recommendations Transfer customs checking procedures from port territory to territory of “Dry port” or receivers. Establish fixed schedule for trains connecting with the port.
Stakeholders concerned Custom Service, Railway Administration, Port Authority.
Actions Push amendments and changes into Technology Scheme of port. Support coordination with port for fixed railway schedule to be approved by Railway Administration

3.5 SWOT EXERCISE

The following "SWOT" tables are still provisional interim documents for the ongoing SWOT exercise to be used for the elaboration of the MoS strategy at National and Regional levels, in accordance with the agreed method, i.e.:

- Initial draft tables were prepared first for each Country based on the project ToRs. The same presentation was kept for the Kiev workshop after some comments were received from a few N.S. / MoTs representatives who did not agree with few fact findings considered to be negative.

- Facts more clearly identified as "S", "W", "O", or "T" elements are being included here, to form the bases for consultations with National Secretaries and MoT counterparts. These versions will be completed progressively for National stakeholders' meetings in line with the process agreed at the Kiev Workshop i.e.:

    - exchanging with each NS/MoT
    - finalising complete draft version for each stakeholders' meeting
    - working on this version at said meeting
    - concluding for the National MoS strategy during on shortly after each meeting
    - sharing national outputs at the regional in an event to be held in the last quarter of 2009.

AZERBAIJAN

S	W
- Bakou intermodal hub of TRACECA corridor • Eastbound with Caspian Sea • Westbound with Europe - Investment programmes underway - Sufficient level of implementation to international agreements and conventions on transport	- Intermodal facilities with different level of capacity use - Limited possibilities to work with Railway ferries, Ro-Ro and containers ships - Imbalanced traffics (imports largely exceed exports) - Formal/ informal procedures, legal/ other formalities
O	**T**
- Cross-corridors position - Investment programmes underway to enhance quality, effectiveness, safety and intermodality of transport infrastructures - Rail capacity available - Railway spare capacity and projects - Port landlord model - Infrastructure and equipment plans for Ro-Ro and combi vessels - More road works in progress/ planned - Planned FIZ and new port in Poti - International company “Polzug” operates railway service Baku-Tbilissi - Key agreement on common activity between ports of Baku and Turkmenbashi - Signed TRACECA Agreement on Multimodal Transport and Model Law on Freight Forwarding Activity - Strong schedule for the ferry lines	

GEORGIA

S	W
- One of the core elements for TRACECA corridor - Poti and Batumi: central intermodal hubs for : • Eastbound MoS (Caucasus and Central Asia) • Westbound MoS (Turkey and Europe) - Existing railway ferries and Ro-Ro lines - Ongoing infrastructure investments • Quay wall renovation (up to– 9 m depth min.) • Improvement of the Ro-Ro, Railway ferries end Container ship facilities - High level of participation in the international agreements and conventions • active participant of TRACECA projects • bilateral and trilateral agreement on Ro-Ro, Ro-ferry services (Ge, Bg, Ua) - Access to the Georgian container market of the huge international company “Polzug”.	- Bottlenecks limiting possibilities to work with Railway ferries - Lack of impact of new line Kars-Tbilisi-Baku - Negative perception by the trade of the country’s political situation - Lack of impact of new line Kars-Tbilisi-Baku (will put into operation in 2010) - Railway is not responsible for the delivery just in time, hence road transport should be involved - High level tariffs on Rail Ferry Poti/Batumi – Illichevsk – Varna - Necessary to develop transit strategy - Railway section Poti – Senaki is a “bottleneck” limiting carrying capacity - Lack of possibility to operate in ports refrigerator containers
O	
- Railway capacity potentials and projects - Port landlord model - Infrastructure and equipment plans for Ro-Ro and combi vessels - Existing railway ferries and Ro-Ro line - All major global container carriers are present at Georgian ports - New, private, well equipped container terminal in Batumi - Government’s anti-corruption policy - Preferential taxation in the FIZ “Poti” - It plans to start direct ferry service from Poti/Batumi to Varna (Bg), Constanza (Ro), Turkey	- Some operators have to put cargo out of container to change the mode of transport because a lot of difficulties within multimodal transportation.

KAZAKHSTAN

S	W
- Land bridge Country China - Caspian Sea – CIAS – Iran - Economic and transport volume growth - Aktau Trade Port dynamics - ISO 9001/2000 and 14001, ISPS Code - Sufficient level of implementation to international agreements and conventions on transport	- Cross-Caspian service has no fixed schedule - High cross-Caspian shipping costs - No backhaul cargo in containers for the moment - Control of empty containers difficult, expensive repositioning costs - Poorly developed network of international standards roads - IT-technologies of control documents and cross border procedures - use within the RK, there is no compliance with neighbouring countries
O	**T**
- Efforts to optimise railways, roads and intermodal - Railways: • New lines covering gaps and extending tracks to two lines • Electrification and connections to neighbouring transport facilities - Aktau Port development plan / intermodal hub with capacities for Ro-Ro, combi or container feeder ships - General strategy of transport development up to 2015; medium-term - programs on each mode of transport - Strong efforts to eliminate gaps and contradictions in national legislation	- Effort for development of alternative routes through Russia, Belarus (Realization of project “West Europe – West China”)
- There is Law on concession activity - Special Economic Zone in Aktau port (preferential taxation) - Improvement of control procedures on the cross border: • on-line manifesto; • electronic seal for transit road cargo; • functions of veterinary, fito, sanitary and other controls delegated to custom authority - Signed TRACECA Agreement on Multimodal Transport and Model Law on Freight Forwarding Activity	

UKRAINE

S	W
- *Importance of Odessa/ Illichevsk port system for connection of central axis, TRACECA corridor and Danube River* - National Transport System Strategy - Guidelines for Ukraine: Integrated program of coordination for all modes of transport - Growing Container handling capacities and volumes - Well-functioning passenger terminal - Combined Railway ferry and Ro-Ro terminal - *Railway ferry/Ro-Ro terminal and existing service* - Intermodal facilities and ISO + ISPIS certificates	- Bottlenecks between railway / road axes and port terminals - Lack of intermodal terminals and logistic centres close to main transport junctions - Considerable number of checking procedures - "Transhipment" regime does not work - Non competitive port tariffs - Not obligatory schedule of Ro-Ro, Rail Ferries
O	**T**
- 85 - 90% of containers carried by road / 10-15% by rail - Ro-Ro line and passenger line Odessa-Istanbul - Support of development of MoS and ports: MoS system poti/ Batumi to Varna, Derince and Samsun - Port system Odessa/ Illichevsk: - ISO 9001:2000 and ISPS code - development plan (about 220 Million euros) to increase handling capacities - one-point stop, x-ray control - Inland Waterway: • Danube River (corridor VII) and Dniepr River/ Belarusian port of Mozer • Russian inland waterways and Caspian Sea - "Free practice" for ship (unloading enables before the checking procedures) - New Regulation of the Cabinet of Ministry, concerning container transportation: • Reduce transit tariffs up to 20% • Reduce checking procedures - New program of railway development - IT program "CIPIS" in process - Signed TRACECA Agreement on Multimodal Transport - Draft law on "transhipment" on approval	- The main competitor port Constanta located nearby and operates more effectively - Russia make big efforts to retarget transport flow from China to Europe through Kazakhstan and its territory by railway - Realization of program "Transport System Development for Russia Federation in 2010-2015" provide for leading development of south sea ports and possibly will entail redirection of traffic flows out of Ukraine

3.6 Synthesis: Added-value of MoS concept

Motorways of the Seas were mainly conceived and set up at the high level of TRACECA in consideration of their expected improvements of the transport along the corridor.

At this stage of the mission, and as a consequence of the analyses made, it is now possible to identify the following concrete impacts that would result from the future MoS developments:

- Efficient multi / inter / co-modal transport solutions on the TRACECA central corridor, efficiently competing with long land distance corridors
- Improvements of whole or segments of transport chain, replicable at National and Regional levels
- Collaborative partnership at National and bi/multi-lateral levels as well as between operating and institutional stakeholders
- Benefits of environmental impacts of combined maritime, rail and inland waterways (possibly sea-river) including road when compared to "all road" transports
- Higher and new markets trades resulting from the above and as illustrated by the first in-depth survey of new potential trades.

To demonstrate these added values will be a particular challenge in the next period, and particularly during and after the stakeholders' meetings as in other meetings or events. All experts will be mobilised to work on these project developments.

4 Next planned key outputs

Activities of the next interim period will be to progress:

- along the timeframe and on the national MoS strategy in each beneficiary country through:

  - preparing project dedicated working package/ diagnostic reports about:

    - ports: MoS port review
    - railways:MoS railway review
    - inland waterways: MoS IW review (where relevant)
    - intermodal operations: MoS intermodal review
    - this including an interim MoS legal review

  - completing SWOT analyses

  - progressing continuously on the identification of MoS barriers and solutions (also based on above "W" and "T")

  - arranging national/regional stakeholders` meetings (national MoS workshops) on dates to be fixed with NSs.

- at regional level after the above meetings

  - To develop awareness and promotion of MoS in line with the TORs, using other national or regional events and on the web-site.
  - To aggregate in regional technical files the outputs of national levels if and when relevant for the preparation of MoS Pilote projects.

Note 1: although it had been requested to develop the Web site within the framework of the general TRACECA web/portal (in coordination with the “Traffic flows” project and now with the “Transport Dialogue” project) this may be done earlier in case the latter is delayed.

Note 2: As experienced during the first period, the program must maintain some flexibility in consideration of the institutional context, other stakeholders' involvements, data availability etc. However it is considered necessary to keep the time frame and to deliver timely ouputs.

5 Project organisation, scheduling and staffing

Table 1: Project progress report (2nd quarter: April- May- June 09)

Project title: Motorways of the Sea for the Black Sea and the Caspian Sea	Project number : EuropeAid126588/C/SER/Multi	Countries : Azerbaijan, Georgia, Kazakhstan, Turkmenistan and Ukraine	Page : 1
Planning period : December 2008- December 2010	Prepared on : 30 June 2009	EC Consultant : Egis Bceom International	

Project objectives: The overall objective of the project is to facilitate trade and transport along the corridor Europe- Black Sea Region- Caucasus- Central Asia through improved interoperability and multi-modal transport on the Black sea and the Caspian Sea. The specific objective is to promote the concept of "Motorways of the Sea" in TRACECA countries.

		TIME FRAME (quarters)								INPUTS							
		2008/2009								PERSONNEL EC Consultant		PERSONNEL Local staff		EQUIPMENT MATERIAL		OTHER	
No	ACTIVITIES IMPLEMENTED	1	2	3	4	1	2	3	4	Planned	Utilised	Planned	Utilised	Planned	Utilised	Planned	Utilised
1	Mobilisation	X	X							Key experts : 132	123	Local experts: 95	95	None	None	14 trips	
2	Review/ analysis of studies	X	X							ST experts : 25	25						
3	Information up-date	X	X														13 return trips + Kiev (Workshop)
4	Market research	X	X														
5	Info, communication and support for the MoS concept	X	X														
6	Identification and contact of main stakeholders	X	X														
7	Partnership structuring support																
8	Support for the promotion of the pilot projects																
9	Assistance in the design of pilot projects																
10	Analysis of business plan																
11	Elaboration of Road Map																
12	Pre-feasibility/ feasibility studies																
13	Impact assessment																
						TOTAL				Key + ST EU experts	144	Local experts	95		None	Return trips	13 + Kiev

Table 2: Resource utilisation report

Project title Motorways of the Sea for the Black Sea and the Caspian Sea	Project number : EuropeAid126588/C/SER/Multi	Countries Azerbaijan, Georgia, Kazakhstan, Turkmenistan and Ukraine	Page : 1
Planning period : December 2008- December 2010	Prepared on 30 June 2009	EC Consultant : Egis Bceom International	
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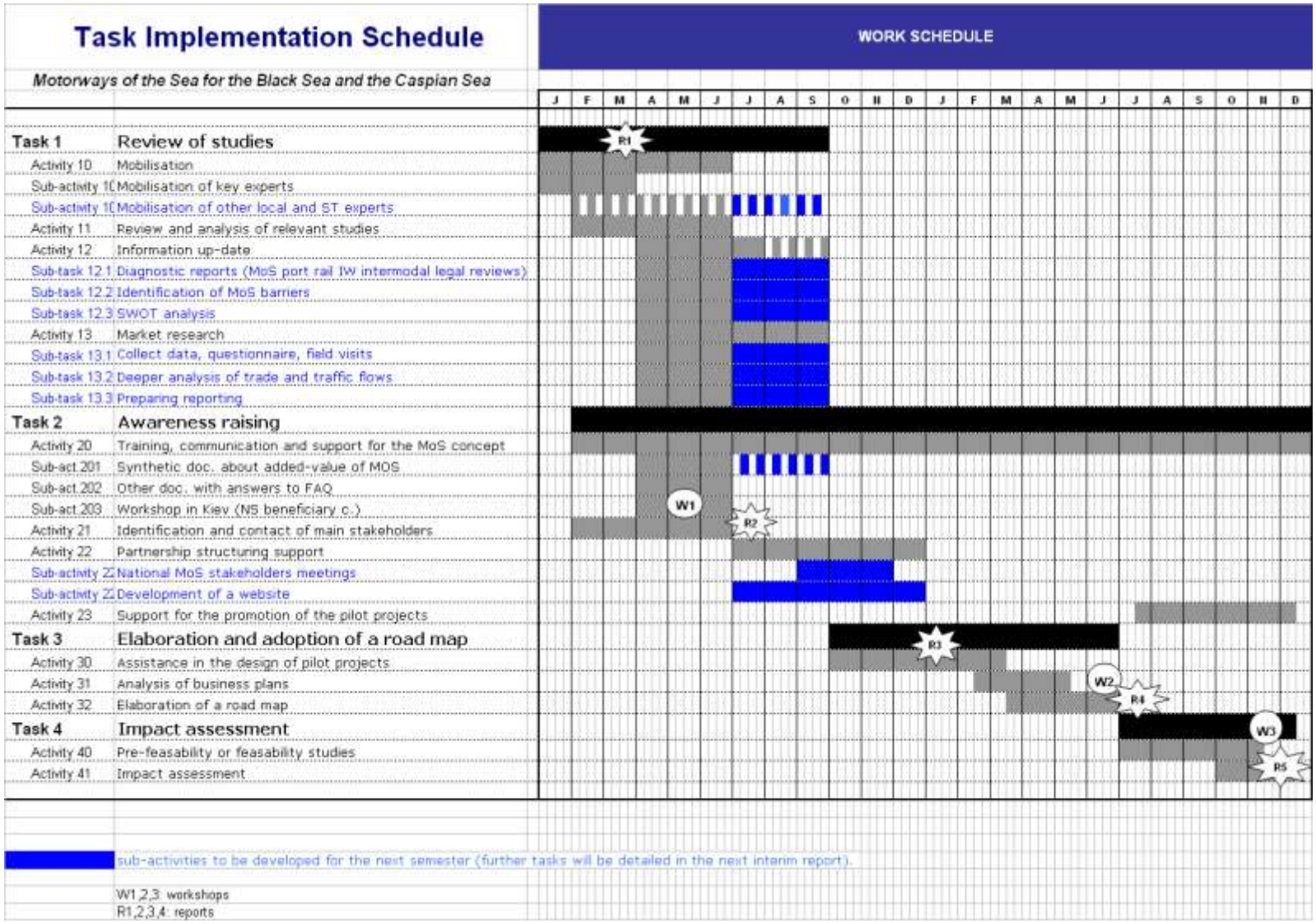
RESOURCES/INPUTS	TOTAL PLANNED	PERIOD PLANNED	PERIOD REALISED	TOTAL REALISED	AVAILABLE FOR REMAINDER
PERSONNEL Long Term Short Term	 2100 586	 227 25	 218 21	 367 21	 1733 565
Sub-Total	**2686**	**252**	**239**	**388**	**2298**
EQUIPMENT AND MATERIAL	No office equipment	No office equipment	No office equipment	No office equipment	No office equipment
Sub-Total	**None**	**None**	**None**	**None**	**None**
OTHER INPUTS Per diems Translation		 60	 57	 101 (without Kiev)	
Sub-Total		60 PD	57 PD	101 PD	0 ds
TOTAL	**2686 WD**	**252 WD** **60 PD**	**239 WD** **57 PD**	**388 WD** **101 PD**	**2298 WD**

Table 3: Overall output performance plan

Project title : Motorways of the Sea for the Black Sea and the Caspian Sea	Project number : EuropeAid126588/C/SER/Multi	Countries : Azerbaijan, Georgia, Kazakhstan, Turkmenistan and Ukraine	Page : 1
Planning period : December 2008 - December 2010	Prepared on : 30 June 2009	EC Consultant : Egis Bceom International	

Outputs (to be described and target dates indicated	Agreed Objective Verifiable Indicators	Constraints and Assumptions
Communication documents (January-June 09) ▪ Inception report 30 March 2009 ▪ 1st Workshop (Kiev) 19-20 May 2009 ▪ 1st Progress report 30 June 2009 ▪ 2nd Progress report 30 June 2010 ▪ Pilot projects 30 June 2010 ▪ Road Map 30 June 2010 ▪ Final report 30 Nov 2010 Further workshops and similar events to be planned in coordination with project stakeholders Projects documents and data base according to project progress	Documents (English/Russian) Reports submitted on time and subsequently accepted by Project Partners	Target dates to be reviewed in the light of new information and new dates agreed where applicable

Table 4: Summary of key project activities planned for the next reporting period



Annex 1: Support documents- Workshop Kiev
19-29 May 2009

TRACECA project "Motorways of the Sea for the Black Sea and the Caspian Sea"

Workshop

List of participants

TRACECA project "Motorways of the Sea for the Black Sea and the Caspian Sea"

№	Name, last name	Organisation	Position
1.	Mr. Nazim Mamedov	TRACECA PS	Expert in Maritime Operations
2.	Ms. Megi Archvadze	Transport Policy Division/Transport Department/Ministry of Economic Development of Georgia	Leading Specialist
3.	Mr. Mamuka Chikhladze	Transport Policy Division/Transport Department/Ministry of Economic Development of Georgia	Senior Specialist
4.	Ms. Lyaila Kussainova	MinTrans/Department for strategic planning and international cooperation	Expert for the Department of strategic planning and international cooperation
5.	Mr. Amangeldy Meshitbayev	MinTrans/Department of transport and transport communications	Expert for the Committee of transport and communications
6.	Mr. Grygoriy Legenkiy	Ministry of Transport and Communications of Ukraine	TRACECA National Secretary , Director of the Department for development and coordination of transport and communication systems
7.	Ms. Antonina Kuzmenko	Ministry of Transport and Communications of Ukraine	Deputy Director of the Department for development and coordination of transport and communication systems
8.	Ms. Svitlana Lipinska	Ministry of Transport and Communications of Ukraine	Specialist of the infrastructure development and coordination unit, Department for development and coordination of transport and communication systems
9.	Mr. Oleg Kornienko	Ministry of Transport and Communications of Ukraine	State road transport administration
10.	Mr. Constantin Gorbatenko	Ministry of Transport and Communications of Ukraine	State road transport administration
11.	Ms. Olga Fisenko	Ministry of Transport and Communications of Ukraine	Marketing and shipping unit, State rail transport administration

12.	Mr. Yevgeniy Golomsha	Ministry of Transport and Communications of Ukraine	Chief department for the development management and technical policy State rail transport administration
13.	Mr. Alexander Nefedov	Ministry of Transport and Communications of Ukraine	Head of coordination unit, State maritime and river transport administration
14.	Ms. Liliya Kondzerskaya	Ministry of Transport and Communications of Ukraine	Specialist of coordination unit State maritime and river transport administration
15.	Ms. Olga Finchuk	Ministry of Transport and Communications of Ukraine	Foreign economic relations division
16.	Mr. Marc Abeille	MoS project	Team Leader
17.	Mr. James Ford	MoS project	Infrastructure specialist
18.	Ms. Jurate Juodsnukyte	Delegation of EU Commission in Ukraine, Belorussia and Moldova	Project Manager
19.	Marina Andreyanova	ENP monitoring program	
20.	Mr. Andreas Schoen	Logistics center proejct	Senior Advisor
21.	Ms. Natalyia Dashchenko	MoS project/EUC	Senior legal experts
22.	Ms. Oksana Novoseletska	MoS project/EUC	Local coordinator
23	Nataliya Rudenko	Euro-Ukraine Consulting	Deputy Director
24	Ms. Oksana Pakholchuk	Euro-Ukraine Consulting	Assistant

Program of the workshop

on TRACECA project «Motorways of the Sea for the Black Sea and the Caspian Sea»
for TRACECA National Secretaries / direct beneficiary Countries

Objective: Develop and share vision of MoS in Black / Caspian Seas countries

Expected results: 1. MoS concept and strategic approach
Examples for other regions: case presentations and discussions

2. Current / "pre-MoS conditions" and expected MoS achievements for beneficiary countries, including SWOT analyses

3. Key bottlenecks for MoS development, including legal and regulatory environment, and possible solutions

Agenda:

May 19, 2009 **First session**

09:00 Registration

09:15 Welcoming

09:30 MoS concept and vision (general)

10:00 Case presentations: Europe / Mediterranean

11:00 Coffee break

11:30 MoS key elements and characteristics

13:00 Lunch

Second session

14:30 SWOT exercise; country presentations

16:00 Coffee break

16:30 Wrap-up of SWOT; Focus on bottlenecks/ obstacles and opportunities

17:00 Region synthesis

17:30 Workshop closure

19:30 Dinner

May 20, 2009

One session (mid-day)

9:30 Brainstorming on MoS bottlenecks and solutions

10:45 Coffee break

11:15 Conclusions and recommendations

12:30 Workshop closure

13:00 Lunch

WORKSHOP

Questions and Answers

Kyiv, 19 – 20 May 2009

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WHAT ARE THE MOTORWAYS OF THE SEA (MoS)? (1/2)

What Objectives?

- Facilitate trade and transport on TRACECA corridor Europe-Black Sea Caucasus-Central Asia
  - reduce bottlenecks: develop solutions
  - increase market volume and transit flows
- Improve interoperability / intermodal transport in Black Sea and Caspian Sea Region
  - within TRACECA markets
  - in framework and coordination of TRACECA programs

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WHAT ARE THE MOTORWAYS OF THE SEA (MoS)?(2/2)

- **Transport chain**
  - maritime based / intermodal
  - freight based (passengers not excluded)
  - efficient connections sea-all land modes
    rail, road and inland waterway
- **A "package" of solutions**
  - "hard": infrastructures, equipments and operations
  - "soft" measures:
    - . procedures, formalities, inspection
    - . port transit on border crossing
    - . I.T. solutions
- **Partnerships**
  - National level: ports (min. 2) and inland modes (min. 2)
  - Bi/multilateral: TRACECA Regional dimension
  - Public Authorities and Operators

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WHAT ARE THE MoS FREIGHT MARKETS?(1/3)

- UNIT LOADS
  - PALLETS, standard or not, all types
  - CASES, BAGS, DRUMS etc.
- LOADING UNITS
  - INTERMODAL Transport Units
  - CONTAINERS: All modes (except air containers)
    All types and sizes, TEUs / FEUs
  - SWAP BODIES
- TRANSPORT UNITS
  - ROAD: Trailers: Semi-trailers, road train types
    All types (+ limits)
    Accompanied / Unaccompanied
  - RAIL: Wagons, all types (+ limits)
    Rail-road units

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WHAT ARE THE MoS FREIGHT MARKETS?(2/3)

Other questions:

- Cargo scopes
  - Non relevant trades
- Geographic scope
  - Units
  - Competition corridors / axes
- Country trades
  - Beneficiary and other TRACECA markets
  - Third / transit markets

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WHAT ARE THE MoS FREIGHT MARKETS?(3/3)

- Market dimension:
  - Information sources and available data
  - Assessment of relevant trades
  - Market forecasts: crisis impact and scenari
- Difficulties and solutions
- Market survey

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WHAT ARE THE MoS TRANSPORT SCHEMES?

- MARITIME TRANSPORT
- SEA / ROAD
  - Ro-Ro, all categories of Rolling units
  - Containerships (full or part)
  - Mixed / combined vessels
- SEA / RAILWAYS
  - Rail ferries
- SEA / INLAND WATERWAYS
  - Sea-River ships: Inland port / maritime port
  - Inland port / transhipment maritime port
- Multimodal, intermodal, combined: what common language?

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WHAT ARE THE MoS KEY ELEMENTS AND CHARACTERISTICS?

MARKETS: Freight volumes

- based on existing and potentials
  - using the corridor
  - using other competitive axes
- "direct" / regional and international trade
- possibly concentrated with transit trade

- What status / treatment offer transit flows?
  - via one Country
  - via all Countries. Ex: China - Mediterranean

8

WHAT ARE THE PILOT PROJECTS CONDITIONS?

- MoS Pilot Projects and MoS projects: what differences?
- What pre-requisites?
  - Market potentials
  - Partnership(s)
  - other Base characteristics
    - maritime services
    - ports / terminals
    - transit solutions
    - intermodal connections
    - door to door
- What role for Public and private stakeholders?

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OPERATIONS AND SERVICES: WHAT REFERENCE CASES?

- Europe / Mediterranean
  - Ro-Ro, accompanied / unaccompanied
  - Containers
  - Mix solutions
- Reference bases in Black and Caspian Seas
  - Rail – ferries
  - Ro-Ro
  - Containers
  - Sea-River

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WHAT LEGAL / INSTITUTIONAL FRAMEWORK?

- Institutions
  - Identification of Authorities and bodies
  - Role, functions and relationship
  - What coordination?

- Laws and regulations

  Trade:
  - Customs
  - Non customs

  Transport:
  - Vessels
  - Ports
  - Inland modes and intermodal

11

FINANCING MoS: WHAT PERSPECTIVES?

- When?
  - Pilot project phases
  - Market and feasibility
  - Investment need assessment
- How? Financing instruments and channels
- Who? Financing institutions

12

PROMOTING MoS: HOW?

- Who: Promoting parties
- For/with who: Concerned stakeholders
- Promotion activities
  - Types
  - Tentative program

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THANK YOU

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Possible criteria for MoS pilot projects

1. Quality Aspects

- Improvement of port services and operations.
  - Commitments to improve services
  - Measures for operation facilitation
- Characteristics of shipping services
  - Improved in frequency and punctuality
  - Improved in safety and security
- Marketing
  - Implementation of market driven tariff structures
  - Anticipation and measures in case of service failures
- Extension of regional inter-modal connections
  - Links with inland depots, dry ports…
  - Links with logistic platforms
- Availability of information systems and monitoring along the transport chain
  - Efficient information exchange
  - Commitment to improve administrative and customs procedures

2. Regional dimension and Network integration

- Geographical coverage of project
- Integration into transport network and potential replication
- New opportunities of market connections
- Accessibility with hinterland and neighbouring regions and countries
- Integration into national and regional transport and development policies

3. Contribution to development of sea-based intermodal solutions

- Modal shift: cargo shifted from road to alternative intermodal maritime transport (where feasible)
- Increased consolidation of freight
- Improved balance of flows
- Environmental benefits

4. Viability of Service and Credibility of Project

- Duration of the project
- References and capacities of Project partners
- Development Plan
- Commitments of potential users and public / private stakeholders
- Financial plan for necessary investments.

5. Effects on competition

- Compliance with international trade agreements
- Impact on existing services on alternative axes
- Potential Market impacts

Annex 2: Glossary

TRACECA project "Motorways of the Sea for the Black Sea and the Caspian Sea"

GLOSSARY ON THE MOTORWAYS OF THE SEA (MoS) AND COMBINED TRANSPORT

СЛОВАРЬ ТЕРМИНОВ ПО МОРСКИМ МАГИСТРАЛЯМ (MoS) И КОМБИНИРОВАННЫМ ПЕРЕВОЗКАМ

Prepared by TRACECA EC project "Motorways of the Sea for the Black Sea and the Caspian Sea"

Paris, 2009

NOTE

This document is drafted based on the UN/ECE "Terminology on Combined Transport" (2001).

The document also includes the terminology on multi-modal transport taken from the Agreement on the Development of Multimodal Transport TRACECA and several definitions related to the Motorways of the Sea (MoS).

ПРИМЕЧАНИЕ

Данный документ был разработан на основе документа ЕЭК ООН «Терминология комбинированных перевозок» (2001 г.).

Документ также содержит некоторые определения по мультимодальным перевозкам, взятым из Соглашения о развитии мультимодальных перевозок ТРАСЕКА, и по тематике морских магистралей.

TERMINOLOGY ON COMBINED TRANSPORT

This document lists the principal terms used in combined transport or related to it.

All the definitions referring specifically to the geographical framework of Europe may be applied to other regions of the world. They are intended for the work of the three intergovernmental organizations that have created this compilation: the European Union (EU), the European Conference of Ministers of Transport (ECMT) and the Economic Commission for Europe of the United Nations (UN/ECE).

The purpose of this glossary is to determine the meaning of the terms in current use, and to make them more easily understandable to the increasing number of people who use them, politicians, technical personnel or operators of the various modes of transport concerned. These definitions are not applicable in their strictest sense to the legal and statistical fields, where relevant reference documents already exist.

Thus, the translation of the most widely used terms in combined transport into the four working languages currently used in the three above-mentioned organizations is intended to harmonize gradually this terminology. In due course this should lead to the adoption of regulatory and statistical glossaries, at both national and intergovernmental levels.

ТЕРМИНОЛОГИЯ КОМБИНИРОВАННЫХ ПЕРЕВОЗОК

В настоящем документе перечисляются основные термины, используемые в комбинированных перевозках или имеющие отношение к этим перевозкам.

Все определения, непосредственно относящиеся к географическим рамкам Европы, могут также использоваться в других регионах мира. Они предназначены для работы трех межправительственных организаций – Европейского союза, Европейской конференции министров транспорта (ЕКМТ) и ЕЭК ООН, подготовивших настоящую компиляцию.

Цель данного глоссария состоит в том, чтобы определить значение используемых в настоящее время терминов и сделать их более доступными для понимания все более широкого круга людей, которые ими пользуются: политиков, технического персонала и операторов перевозок различными видами транспорта. Эти определения в их самом узком смысле не могут применяться в области права и статистики, где уже существуют соответствующие справочные документы.

Таким образом, перевод наиболее широко используемых в комбинированных перевозках терминов на четыре рабочих языка, используемых в настоящее время в вышеупомянутых организациях, преследует цель постепенного согласования этой терминологии. В конечном итоге это должно привести к принятию на национальном и межправительственном уровняз глоссариев для применения в области права и статистики.

CONTENTS - СОДЕРЖАНИЕ

I. GENERAL TERMS
I. ОБЩИЕ ТЕРМИНЫ

1.0 ACCOMPANIED COMBINED TRANSPORT:

Transport of a complete road vehicle, accompanied by the driver, using another mode of transport (for example ferry or train).

1.0 КОМБИНИРОВАННАЯ ПЕРЕВОЗКА С СОПРОВОЖДЕНИЕМ

Перевозка укомплектованного автотранспортного средства в сопровождении водителя с использованием другого вида транспорта (например, парома или поезда).

1.1 COMBINED TRANSPORT:

Intermodal transport where the major part of the European journey is by rail, inland waterways or sea and any initial and/or final legs carried out by road are as short as possible.

1.1 КОМБИНИРОВАННАЯ ПЕРЕВОЗКА:

Интермодальная перевозка, в рамках которой большая часть европейского рейса приходится на железнодорожный, внутренний водный или морской транспорт и любой начальный и/или конечный отрезок пути, на котором используется автомобильный транспорт, является максимально коротким.

1.2 CONSIGNMENT:

Freight sent under a single contract of carriage.

In combined transport, this term may be used for statistical purposes, to measure loading units or road vehicles.

The grouping together of several consignments into a full load is called consolidation or groupage.

1.2 ГРУЗОВАЯ ОТПРАВКА:

Груз, отправленный на основании одного договора перевозки

В комбинированных перевозках данный термин может использоваться в статистических целях для подсчета грузовых единиц или автотранспортных средств.

Под объединением нескольких грузовых отправок в полную партию подразумевается консолидация или укрупнение грузовых партий.

1.3 FEEDER SERVICE:

Short sea shipping service which connects at least two ports in order for the freight (generally containers) to be consolidated or redistributed to or from a deep-sea service in one *of* these ports.

By extension, this concept may be used for inland transport services.

1.3 ФИДЕРНЫЕ ПЕРЕВОЗКИ:

Морская перевозка на короткое расстояние между по меньшей мере двумя портами с целью группировки или распределения грузов (обычно контейнеров) в одном из этих портов для перевозки в открытом море или после такой перевозки.

В более широком смысле данная концепция может использоваться для внутренних перевозок.

1.4 INTERMODAL TRANSPORT:

The movement of goods in one and the same loading unit or road vehicle, which uses successively two or more modes of transport without handling the goods themselves in changing modes.

By extension, the term intermodality has been used to describe a system of transport whereby two or more modes of transport are used to transport the same loading unit or truck in an integrated manner, without loading or unloading, in a [door to door] transport chain.

1.4 ИНТЕРМОДАЛЬНАЯ ПЕРЕВОЗКА:

Последовательная перевозка грузов двумя или более видами транспорта в одной и той же грузовой единице или автотранспортном средстве без перегрузки самого груза при смене вида транспорта.

В более широком смысле термин «интермодальность» применяется для системы транспортировки, предполагающей использование двух или более видов транспорта для перевозки одной и той же грузовой единицы или грузового автотранспортного средства в рамках комплексной транспортной цепи (от двери до двери) без погрузочно-разгрузочных операций.

1.5 LIFT-ON-LIFT-OFF (LO-LO):

Loading and unloading of intermodal transport units (ITU, see 4.1) using lifting equipment.

1.5 ВЕРТИКАЛЬНЫЙ МЕТОД ПОГРУЗКИ И ВЫГРУЗКИ («ЛО-ЛО»)

Погрузка и выгрузка интермодальных транспортных единиц (ИТЕ, см.4, 1) с использованием подъемного оборудования.

European Commission Communication COM(97)243 Final used the term intermodality to describe a system of transport where at least two different modes of transport are used in an integrated way to complete a door to door transport chain.

1.6 LIMIT OF LIABILITY:

The maximum sum of money payable by a carrier to a shipper for any damage or loss to the cargo for which the carrier is liable under the contract of carriage. The amount of the limitation is determined by agreement or by law.

1.6 ПРЕДЕЛ ОТВЕТСТВЕННОСТИ:

Максимальная денежная сумма, выплачиваемая перевозчиком грузоотправителю за любое повреждение груза или его утрату, за которые перевозчик несет ответственность по договору перевозки. Предельная сумма определяется по договоренности или в соответствии с законом.

1.7 LOGISTICS:

The process of designing and managing the supply chain in the wider sense.

The chain can extend from the delivery of supplies for manufacturing, through the management of materials at the plant, delivery to warehouses and distribution centres, sorting, handling, packaging and final distribution to point of consumption.

1.7 ЛОГИСТИКА:

Процесс организации цепи доставки и управления этой цепью в самом широком смысле.

Данная цепь может охватывать, как поставки сырья, необходимого для производства, так и управление материальными ресурсами на предприятии, доставку на склады и в распределительные центры, сортировку, переработку, упаковку и окончательное распределение в местах потребления.

1.8 MOTORWAYS OF THE SEA (EUROPEAN COMMISSION'S DEFINITION AS PER PROJECT TORS):

The Motorways of the Sea (MoS) have been defined by the European Commission as high quality, frequent door-to-door intermodal services relying on maritime transport for the long haul. The Motorways of the sea seek to achieve modal shift or cohesion by concentration of flows of freight on sea-based routes by improving existing maritime links or establishing new viable, regular and frequent maritime links for the transport of goods.

1.8 МОРСКИЕ МАГИСТРАЛИ (ОПРЕДЕЛЕНИЕ ЕВРОПЕЙСКОЙ КОМИССИИ СОГЛАСНО ТЕХНИЧЕСКОМУ ЗАДАНИЮ ПРОЕКТА):

Морские магистрали (MoS) были определены Европейской Комиссией, как высококачественные, регулярные интермодальные перевозки, организованные на принципах «от двери к двери», при осуществлении которых на дальних участках пути задействуется морской транспорт. Морские магистрали служат для организации модальной перевозки или взаимосвязанной цепи перевозок путем концентрации грузовых потоков на морских маршрутах, усовершенствуя существующие морские связи либо, устанавливая новые, эффективные, регулярные и частые морские цепи для перевозки товаров.

1.9 MULTIMODAL TRANSPORT:

Carriage of goods by two or more modes of transport.

1.9 МУЛЬТИМОДАЛЬНАЯ ПЕРЕВОЗКА:

Перевозка грузов двумя или более видами транспорта

1.10 MULTIMODAL TRANSPORT CONTRACT

Multimodal transport contract means a contract for the carriage of goods by two or more modes of transport.

1.10 ДОГОВОР МУЛЬТИМОДАЛЬНОЙ ПЕРЕВОЗКИ

Договор мультимодальной перевозки – договор на перевозку грузов с использованием двух и более видов транспорта.

1.11 MULTIMODAL TRANSPORT DOCUMENT

Multimodal transport document means a document evidencing a multimodal transport contract issued in a negotiable or a non-negotiable form (consignment note of multimodal transportation, multimodal transport waybill and any other legally accepted form), whereby the MTO has accepted the goods for carriage and assumed the responsibility to deliver the goods as agreed thereby.

1.11 ДОКУМЕНТ МУЛЬТИМОДАЛЬНОЙ ПЕРЕВОЗКИ

Документ мультимодальной перевозки – документ, удостоверяющий заключение договора мультимодальной перевозки, выданный в оборотной или необоротной форме (в

форме коносамента мультимодальной перевозки, накладной мультимодальной перевозки или в любой иной законной форме) и подтверждающий принятие груза оператором мультимодальной перевозки в свое ведение, а также его обязательство доставить груз в соответствии с условиями этого договора.

1.12 MULTIMODAL TRANSPORT OPERATOR

Multimodal transport operator (MTO) means a natural or legal person who concludes a multimodal transport contract and assumes responsibility for the performance there of by issuing a document of multimodal transportation either in negotiable or non-negotiable form, and on its behalf organizes multimodal transport.

1.12 ОПЕРАТОР МУЛЬТИМОДАЛЬНОЙ ПЕРЕВОЗКИ

Оператор мультимодальной перевозки (ОМП) – физическое или юридическое лицо, заключающее договор мультимодальной перевозки и принимающее на себя полную ответственность за его исполнение посредством выдачи переводного или непереводного документа мультимодальной перевозки, осуществляющее организацию мультимодальной перевозки от своего имени/

1.13 ROAD-RAIL TRANSPORT:

Combined transport by rail and road.

*In English, the term **piggyback** does not refer to combined transport in general but specifically to the transport by rail of road semi-trailers.*

1.13 АВТОМОБИЛЬНО-ЖЕЛЕЗНОДОРОЖНАЯ ПЕРЕВОЗКА:

Комбинированная перевозка железнодорожным и автомобильным транспортом.

*В русском языке термин **«контрейлерная перевозка»** относится к частному случаю перевозки автомобильных полуприцепов по железной дороге.*

1.14 ROLL-ON-ROLL-OFF (RO-RO):

Loading and unloading of a road vehicle, a wagon or an ITU on or off a ship on its own wheels or wheels attached to it for that purpose. In the case of rolling road, only road vehicles are driven on and off a train.

1.14 ГОРИЗОНТАЛЬНЫЙ МЕТОД ПОГРУЗКИ И ВЫГРУЗКИ («РО-РО»):

Погрузка или выгрузка автотранспортных средств, вагона или ИТЕ на судно или с судна на их собственных колесах или колесах, которыми они оснащаются для этой цели. В случае «катящегося шоссе» только автотранспортные средства въезжают на железнодорожную платформу или съезжают с нее.

1.15 ROLLING ROAD:

Transport of complete road vehicles, using roll-on roll-off techniques, on trains comprising low-floor wagons throughout

1.15 «КАТЯЩЕЕСЯ ШОССЕ»

Перевозка груженых автотранспортных средств с использованием горизонтального метода погрузки и выгрузки на железнодорожных платформах с пониженным полом

1.16 SHORT SEA SHIPPING:

Movement of cargo by sea between ports situated in Europe as well as between ports in Europe and ports situated in non-European countries having a coastline on the enclosed seas bordering Europe.

1.16 МОРСКАЯ ПРЕВОЗКА НА КОРОТКОЕ РАССТОЯНИЕ:

Перевозка груза по морю между портами, находящимися в Европе, а также между европейскими портами и портами, расположенными в неевропейских странах, омываемых замкнутыми морями, по которым проходит граница европейских стран.

1.17 TRANSSHIPMENT:

Moving ITUs from one means of transport to another.

1.17 ПЕРЕВАЛКА:

Перемещение ИТЕ с одного вида транспорта на другой.

1.18 UNACCOMPANIED COMBINED TRANSPORT:

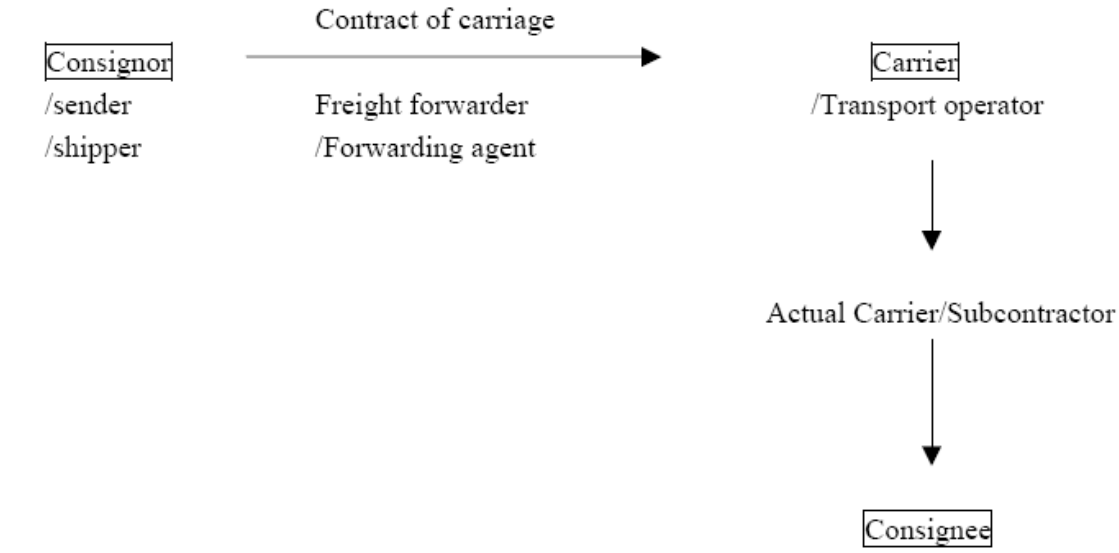
Transport of a road vehicle or an intermodal transport unit (ITU, see 4.1), not accompanied by the driver, using another mode of transport (for example a ferry or a train).

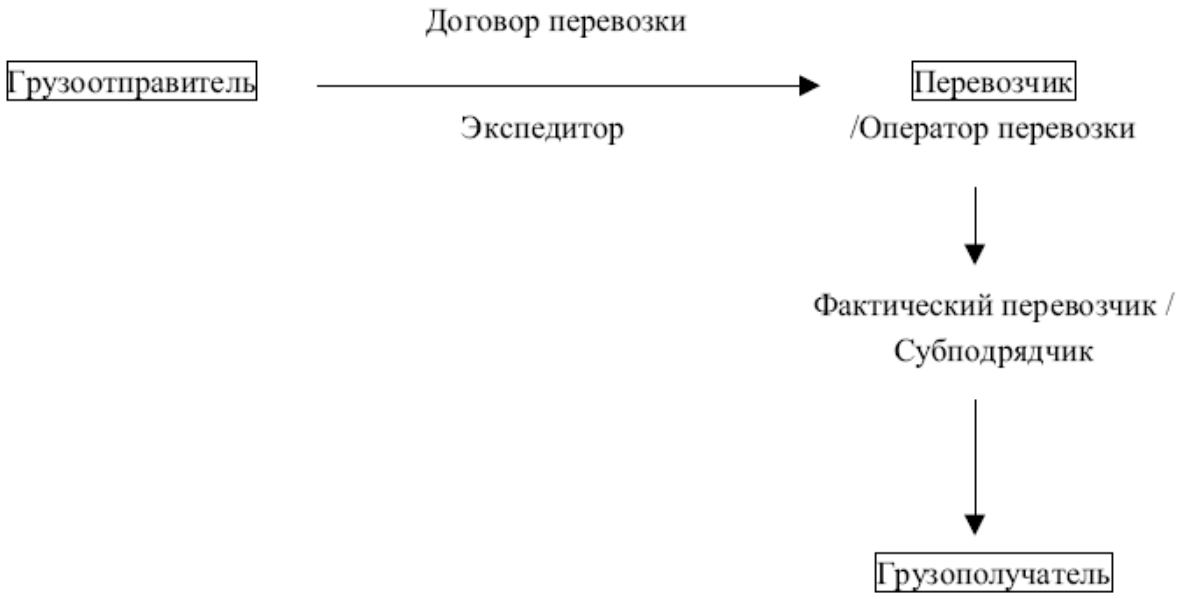
1.18 КОМБИНИРОВАННАЯ ПЕРЕВОЗКА БЕЗ СОПРОВОЖДЕНИЯ:

Перевозка автотранспортного средства или интермодальной транспортной единицы (ИТЕ, см. 4.1) без водителя с использованием другого вида транспорта (например парома или поезда).

II. COMBINED TRANSPORT ACTORS

II. УЧАСТНИКИ КОМБИНИРОВАННОЙ ПЕРЕВОЗКИ





- ═══ These are the only terms employed in an international contract of transport, i.e. any other member of the transport chain is referred to, in the contract, as one of these.

- ⟶ = Contract of Carriage.

- ═══ в международных договорах перевозки используются только вышеуказанные термины, т.е. любой участник транспортной цепи упоминается в договоре как один из них.

- ⟶ = договор перевозки.

In the following definitions, a person means either a physical or legal person or a company.

В последующих определениях, приведенных в настоящей главе, под лицом подразумевается либо физическое, либо юридическое лицо или компания.

2.0 ACTUAL CARRIER/SUBCONTRACTOR:

A third party who performs the carriage completely or partly.

2.0 СУБПОДРЯДЧИК/ДЕЙСТВИТЕЛЬНЫЙ ПЕРЕВОЗЧИК:

Третья сторона, осуществляющая полную либо частичную перевозку.

2.1 CONSIGNEE:

Person entitled to take delivery of the goods.

2.1 ГРУЗОПОЛУЧАТЕЛЬ:

Лицо, имеющее право получать доставленные грузы.

2.2 FORWARDING AGENT/FREIGHT FORWARDER:

Intermediary who arranges for the carriage of goods and/or associated services on behalf of a shipper.

2.2 ЭКСПЕДИТОР:

Посредник, организующий перевозку грузов и/или предоставление сопутствующих услуг по поручению грузоотправителя.

2.3 MULTIMODAL TRANSPORT OPERATOR (MTO):

Any person who concludes a multimodal transport contract and assumes the whole responsibility for the performance thereof as a carrier or a transport operator.

2.3 ОПЕРАТОР МУЛЬТИМОДАЛЬНОЙ ПЕРЕВОЗКИ (ОМП):

Любое лицо, заключающее договор мультимодальной перевозки и принимающее на себя полную ответственность за его осуществление в качестве перевозчика или оператора перевозки.

2.4 SHIPPER/CONSIGNOR/SENDER:

A person or company who puts goods in the care of others (forwarding agent/freight forwarder, carrier/transport operator) to be delivered to a consignee.

2.4 ГРУЗООТПРАВИТЕЛЬ:

Лицо или компания, которые передают грузы в ведение других лиц или компаний (экспедитора, перевозчика/оператора перевозки) для его доставки грузополучателю.

2.5 TRANSPORT OPERATOR/ CARRIER:

The person responsible for the carriage of goods, either directly or using a third party.

2.5 ОПЕРАТОР ПЕРЕВОЗКИ/ПЕРЕВОЗЧИК:

Лицо, которое либо непосредственно отвечает за перевозку грузов, либо использует для этой перевозки третью сторону.

III. TRANSPORT UNITS

III. ТРАНСПОРТНЫЕ ЕДИНИЦЫ

3.0 ARTICULATED VEHICLE:

A motor vehicle coupled to a semi-trailer.

3.0 СОЧЛЕНЕННОЕ ТРАНСПОРТНОЕ СРЕДСТВО:

Автотранспортное средство с полуприцепом.

3.1 "BASKET" WAGON:

A rail wagon with a demountable subframe, fitted with devices for vertical handling, to allow the loading and unloading of semi-trailers or road vehicles.

3.1 ВАГОН КОРЗИННОГО ТИПА:

Железнодорожный вагон, оборудованный приспособлениями для вертикальной перегрузки, со съемным подрамником, допускающим погрузку в него и выгрузку из него полуприцепов или автотранспортных средств.

3.2 BIMODAL SEMI-TRAILER (RAIL-ROAD):

A road semi-trailer that can be converted into a rail wagon by the addition of rail bogies.

3.2 БИМОДАЛЬНЫЙ ПОЛУПРИЦЕП (ЖЕЛЕЗНОДОРОЖНО-АВТОМОБИЛЬНЫЙ):

Автомобильный полуприцеп, который после оснащения его железнодорожными тележками может быть использован в качестве железнодорожного вагона.

3.3 DOUBLE STACK VAGON:

A rail wagon designed for the transport of containers stacked on top of each other.

3.3 ДВУХЪЯРУСНЫЙ ВАГОН:

Железнодорожный вагон, предназначенный для перевозки контейнеров в два яруса.

3.4 LOW FLOOR WAGON:

A rail wagon with a low loading platform built to carry, inter alia, ITUs (see 4.1).

3.4 ВАГОН С ПОНИЖЕННЫМ ПОЛОМ:

Железнодорожный вагон с пониженной грузовой платформой, изготовленный для перевозки, в частности, ИТЕ (см. 4.1).

3.5 OVERPANAMAX/POST PANAMAX:

Ship with at least one dimension greater than Panamax.

3.5 СУПЕРПАНАМАКС:

Судно, у которого по меньшей мере один из габаритов превышает габариты судна панамакс.

3.6 POCKET WAGON:

A rail wagon with a recessed pocket to accept the axle/wheel assembly of a semi-trailer.

3.6 ВАГОН С НИШАМИ ДЛЯ КОЛЕС:

Железнодорожный вагон с предусмотренными в его полу нишами для колес полуприцепов.

3.7 ROAD TRAIN:

A motor vehicle coupled to a trailer (sometimes referred to in English as a drawbar-trailer combination).

3.7 АВТОПОЕЗД:

Автотранспортное средство с прицепом.

3.8 ROLLING-ROAD WAGON:

A rail wagon with low floor throughout which, when coupled together, form a rolling-road (cf. 1.4 and 1.7).

3.8 ВАГОН «КАТЯЩЕГОСЯ (БЕГУЩЕГО) ШОССЕ»:

Железнодорожные вагоны с низким полом, образующие в сцепке "катящееся (бегущее) шоссе" (см. пункты 1.4 и 1.7).

3.9 SEMI-TRAILER:

A non-powered vehicle for the carriage of goods, intended to be coupled to a motor vehicle in such *a way* that a substantial part of its weight and of its load is borne by the motor vehicle. Semi-trailers may have to be specially adapted for use in combined transport.

3.9 ПОЛУПРИЦЕП:

Транспортное средство без двигателя, используемое для перевозки грузов и предназначенное для сцепки с автотранспортным средством таким образом, чтобы значительная часть его веса и нагрузки передавалась на это автотранспортное средство. Полуприцепы могут специально оборудоваться для комбинированных перевозок.

3.10 "SPINE" WAGON:

A rail wagon with a central chassis designed to carry a semi-trailer.

3.10 ВАГОН ТИПА «СПАЙН»:

Железнодорожный вагон с центральным шасси, предназначенным для перевозки полуприцепа.

IV. LOADING UNITS

IV. ГРУЗОВЫЕ ЕДИНИЦЫ

4.0 CONTAINER:

Generic term for a box to carry freight, strong enough for repeated use, usually stackable and fitted with devices for transfer between modes.

4.0 КОНТЕЙНЕР:

Общее обозначение емкости для перевозки груза, являющейся достаточно прочной для многократного использования, обычно пригодной для штабелирования и оснащенной приспособлениями, позволяющими ее транспортировать на различных видах транспорта.

4.1 CORNER FITTING:

Fixed points usually located at the top and bottom corners of a container into which twistlocks or other devices engage to enable the container to be lifted, stacked, secured.

These fittings are increasingly used on swap bodies, although not on the corners but at points which are compatible with 20 or 40 feet container corner fittings.

4.1 УГЛОВОЙ ФИТТИНГ:

Места крепления, находящиеся обычно в верхних и нижних углах контейнера, в которые вводятся поворотные замки или другие приспособления, позволяющие поднимать, штабелировать, закреплять контейнер.

Эти фитинги все чаще используются на съемных кузовах, но не в углах, а в местах, соответствующих местоположению угловых фитингов на 20- или 40-футовых контейнерах.

4.2 INTERMODAL TRANSPORT UNIT (ITU):

Containers, swap bodies and semi-trailers suitable for intermodal transport.

4.2 ИНТЕРМОДАЛЬНАЯ ТРАНСПОРТНАЯ ЕДИНИЦА (ИТЕ):

Контейнеры, съемные кузова и полуприцепы, пригодные для интермодальной перевозки.

4.3 LAND CONTAINER:

Container complying with International Railway Union (UIC) specifications, for use in rail-road combined transport.

4.3 НАЗЕМНЫЙ КОНТЕЙНЕР:

Контейнер, соответствующий техническим требованиям Международного союза железных дорог (МСЖД) и предназначенный для использования в железнодорожно-автомобильных комбинированных перевозках.

4.4 LOADING UNIT:

Container or swap body

4.4 ГРУЗОВАЯ ЕДИНИЦА:

Контейнер или съемный кузов.

4.5 MARITIME CONTAINER:

A container strong enough to be stacked in a cellular ship and to be top lifted.

Most maritime containers are ISO containers, i.e. they confirm to all relevant International Organization for Standardization (ISO) standards.

4.5 МОРСКОЙ КОНТЕЙНЕР:

Контейнер, являющийся достаточно прочным для штабелирования в ячеистом контейнеровозе и для подъема сверху.

Большинство морских контейнеров являются контейнерами ИСО, т.е. соответствуют нормам Международной организации по стандартизации (ИСО).

4.6 STACKING:

Storage or carriage of ITUs on top of each other.

4.6 ШТАБЕЛИРОВАНИЕ:

Хранение или перевозка ИТЕ с установкой их одна на другую.

4.7 STUFFING/STRIPPING:

Loading and unloading of cargo into or from an ITU.

4.7 ЗАГРУЗКА/ВЫГРУЗКА:

Загрузка и выгрузка груза в или из ИТЕ.

4.8 SUPER HIGH CUBE CONTAINER:

Container exceeding ISO dimensions. These dimensions vary and may include, for example, lengths of 45' (13.72 m), 48' (14.64 m), or 53' (16.10 m).

4.8 КОНТЕЙНЕР СВЕРХВЫСОКОЙ ЕМКОСТИ:

Контейнер, размеры которого превышают стандарты ИСО. Его размеры могут варьироваться и составлять, например, по длине 45 футов (13,72 м), 48 футов (14,64 м) или 53 фута (16,10 м).

4.9 SWAP BODY:

A freight carrying unit optimised to road vehicle dimensions and fitted with handling devices for transfer between modes, usually road/rail.

Originally, such units were not capable of being stacked when full or top-lifted. But many units can now be stacked and top-lifted and the main feature distinguishing them from containers is that they are optimised to vehicle dimensions. Such units would need a UIC approval to be used on rail. Some swap bodies are equipped with folding legs on which the unit stands when not on the vehicle.

4.9 СЪЕМНЫЙ КУЗОВ:

Единица перевозки груза, размеры которой соответствуют габаритам автотранспортного средства и которая оборудована погрузочно-разгрузочными приспособлениями, предназначенными для ее перемещения между различными видами транспорта, как правило, автомобильным и железнодорожным.

Первоначально такие единицы не были пригодны для штабелирования в груженом состоянии или для подъема сверху. Однако в настоящее время многие такие единицы могут штабелироваться и подниматься сверху, и главной особенностью, отличающей их от контейнеров, является то, что их размеры соответствуют габаритам транспортных средств. Если они предназначаются для перевозки железнодорожным транспортом, то должны соответствовать нормам МСЖД. Некоторые съемные кузова оснащены откидными опорами, на которые они опираются, когда не находятся на транспортном средстве.

4.10 TARE:

Weight of ITU or vehicle without cargo.

4.10 ТАРА:

Вес ИТЕ или транспортного средства без груза.

4.11 TEU:

Twenty-foot Equivalent Unit. A standard unit based on an ISO container of 20 feet length (6.10 m), used as a statistical measure of traffic flows or capacities.

One standard 40' ISO Series 1 container equals 2 TEUs.

4.11 ТЕУ:

Единица, эквивалентная двадцати футам. Стандартная единица, которой служит контейнер ИСО длиной 20 футов (6,10 м) и которая используется для статистических измерений, касающихся транспортных потоков или пропускной способности.

Один стандартный 40-футовый контейнер серии 1 ИСО равняется 2 ТЕУ.

4.12 TWISTLOCK:

Standard mechanism on handling equipment which engages and locks into the corner fittings of ITU; also used on ships and vehicles to fix ITUs.

4.12 ПОВОРОТНЫЙ ЗАМОК:

Стандартный механизм погрузочно-разгрузочного оборудования, который вводится за угловые фитинги ИТЕ и закрепляется на них; используется также на судах и транспортных средствах для крепления ИТЕ.

V. THE UNIT LOAD

V. ГРУЗОВОЕ МЕСТО

5.0 "BIG BAG":

A removable internal liner, strong enough to be lifted and to carry bulk cargoes of different types.

5.0 «БИГ-БЭГ»:

Сменный мешок, вкладываемый в ИТЕ и являющийся достаточно прочным для подъема и перевозки грузов различного типа навалом.

5.1 PALLET:

A raised platform, normally made of wood, facilitating the handling of goods. Pallets are of standard dimensions. The most used in Europe are 1000 mm x 1200 mm (ISO) and 800 mm x 1200 mm (CEN).

5.1 ПОДДОН

Поднимаемая, как правило, деревянная платформа, облегчающая перегрузку грузов. Поддоны имеют стандартные размеры. Чаще всего в Европе используются поддоны со следующими габаритами: 1 000 мм x 1 200 мм (ИСО) и 800 мм x 1 200 мм (ЕКС).

5.2 UNIT LOAD:

Palletised load or prepacked unit with a footprint conforming to pallet dimensions and suitable for loading into an ITU.

5.2 ГРУЗОВОЕ МЕСТО:

Груз на поддоне или предварительно упакованная грузовая единица, размеры которой по периметру соответствуют габаритам поддона и которая может быть помещена в ИТЕ.

VI. INFRASTRUCTURE AND EQUIPMENT

VI. ИНФРАСТРУКТУРА И ОБОРУДОВАНИЕ

6.0 CRANE:

Conventional lifting crane where the load is suspended by cable via a jib.

The handling of ITUs requires the cable to be connected to the ITUs' corners.

6.0 СТРЕЛОВОЙ КРАН:

Обычный стреловой кран, на котором груз удерживается стрелой с помощью троса.

Для погрузки или выгрузки ИТЕ трос должен быть соединен с угловыми элементами ИТЕ.

6.1 DRY PORT:

Inland terminal which is directly linked to a maritime port.

A **Dry Port** is a port situated in the hinterland servicing an industrial/ commercial region, connected with one or several ports with rail- or road transport and is offering specialized services between the dry port and the overseas destinations. Normally the dry port is container and multimodal oriented and has all logistics services and facilities, which is needed for shipping and forwarding agents in a port.

In addition to their role in cargo transshipment, dry ports may also include facilities for storage and consolidation of goods, maintenance for road or rail cargo carriers and customs clearance services. The location of these facilities at a dry port relieves competition for storage and customs space at the seaport itself.

6.1 СУХОЙ ПОРТ:

Внутренний терминал, который непосредственно связан с морским портом.

Сухой порт – это порт, расположенный на прибрежной территории, обслуживающей промышленный/торговый регион, соединенный с одним или несколькими портами железнодорожным или автомобильным сообщением, и предлагающий специализированные услуги на пути следования от сухого порта и до дальних мест назначения. Обычно сухой порт ориентирован на контейнерные и мультимодальные перевозки и имеет все логистические услуги и оборудование, необходимое для морских и экспедиторских агентов в порту.

В дополнение к своей роли по «трансшипменту» грузов, сухие порты могут также включать возможности хранения и консолидации товаров, обслуживание авто и железнодорожных перевозчиков, а также услуги по таможенной очистке грузов.
Размещение этих возможностей в сухом порту дает возможность высвободить пространство, необходимое для организации складских помещений и организации таможенного пространства в самом морском порту.

6.2 FORK LIFT TRUCK:

Vehicle equipped with power-driven horizontal forks, which allow it to lift, move or stack pallets, containers or swap bodies. The latter two are usually empty.

These operations can only be performed on the front row of stack

6.2 ВИЛОЧНЫЙ АВТОПОГРУЗЧИК:

Транспортное средство, оборудованное горизонтальными вилочными приспособлениями с силовым приводом, позволяющими поднимать, перемещать или штабелировать поддоны, контейнеры или съемные кузова, при этом последние два типа грузовых единиц являются, как правило, порожними.

Эти операции могут осуществляться только применительно к переднему ярусу штабеля.

6.3 FREEPORT:

Zone where goods can be manufactured and/or stored without payment of their relevant duties and taxes.

6.3 СВОБОДНАЯ ТАМОЖЕННАЯ ЗОНА, СВОБОДНЫЙ СКЛАД:

Зона, в пределах которой товары могут изготавливаться и/или храниться без уплаты соответствующих пошлин и налогов.

6.4 GANTRY CRANE:

An overhead crane comprising a horizontal gantry mounted on legs which are either fixed, run in fixed tracks or on rubber tyres with relatively limited manoeuvre. The load can be moved horizontally, vertically and sideways.

Such cranes normally straddle a road/rail and/or ship/shore interchange.

6.4 ПОРТАЛЬНЫЙ КРАН:

Мостовой кран, конструкция которого включает горизонтальный портал, установленный на опорах, которые либо являются стационарными, либо перемещаются по рельсовой колее, либо на резиновых шинах с относительно ограниченным маневром в одном направлении. Груз может перемещаться горизонтально, вертикально и в боковом направлении.

Такие краны обычно обеспечивают перемещение грузов с автотранспортного средства на железную дорогу или с судна на берег.

6.5 HUB:

Central point for the collection, sorting, transshipment and distribution of goods for a particular area.

This concept comes from a term used in air transport for passengers as well as freight. It describes collection and distribution through a single point ***("Hub and Spoke"*** *concept).*

6.5 СОРТИРОВОЧНЫЙ ЦЕНТР:

Центральный пункт сбора, сортировки, перевалки и распределения грузов для определенного региона (района).

Данная концепция происходит от термина, использующегося в воздушных перевозках как пассажиров, так и грузов. Она предполагает сбор и распределение грузов через единый пункт (концепция ***"Хаб энд Споук"****).*

6.6 LOADING TRACK:

Track on which ITUs are transshipped.

6.6 ПОГРУЗОЧНО-РАЗГРУЗОЧНЫЙ ПУТЬ:

Железнодорожный путь, на котором осуществляются операции по перегрузке ИТЕ.

6.7 LOGISTIC CENTRE:

Geographical grouping of independent companies and bodies which are dealing with freight transport (for example, freight forwarders, shippers, transport operators, customs) and with accompanying services (for example, storage, maintenance and repair), including at least a terminal.

In English, also called "Freight village ". In Italian, also called "Interporto".

6.7 ЛОГИСТИЧЕСКИЙ ЦЕНТР:

Территориальное объединение независимых компаний и органов, занимающихся грузовыми перевозками (например, транспортных посредников, грузоотправителей, операторов перевозок, таможенных органов) и сопутствующими услугами (например, по хранению, техническому обслуживанию и ремонту), включающее по меньшей мере один терминал.

В итальянском языке используется термин ***"interporto".***

6.8 PRIVATE SIDING:

Direct rail connection to a company.

6.8 ЧАСТНЫЙ ПОДЪЕЗДНОЙ ПУТЬ:

Прямое железнодорожное соединение с путями какой-либо компании.

6.9 RAIL LOADING GAUGE:

The profile through which a rail vehicle and its loads (wagons - ITUs) must pass, taking into account tunnels and track-side obstacles.

There are 4 basic gauges recognised by UIC: international gauge, A, B and C gauge. These gauges are indicated for individual lines.

In principle, the smallest loading gauge may not be exceeded throughout the transport journey. Restrictions regarding the width and height of the load in curves have to be taken into account.

Combined transport consignments often exceed loading gauges A and B. Another gauge of particular significance for combined transport is the B+ Gauge. There are also many other gauge codes (P/C/S/..) recognised.

6.9 ГАБАРИТЫ ПОГРУЗКИ НА ЖЕЛЕЗНЫХ ДОРОГАХ:

Максимальное поперечное сечение, за пределы которого не должен выходить железнодорожный подвижной состав с грузом (вагоны – ИТЕ), с учетом размеров препятствий в туннелях и на перегонах.

Существуют следующие основные четыре габарита, признаных МСЖД: международный, A, B и C.

Эти габариты указаны для индивидуальных линий.

В принципе несоблюдение минимального габарита погрузки в ходе перевозки не допускается. Должны учитываться ограничения по ширине и высоте груза на поворотах.

В случае грузовых отправок в рамках комбинированных перевозок габариты A и B зачастую превышаются. Другим габаритам, имеющим особое значение для комбинированных перевозок, является габарит B+. Существует также много других признанных габаритов (P/C/S/…).

6.10 REACH STACKER:

Tractor vehicle with front equipment for lifting, stacking or moving ITUs.

6.10 ШТАБЕЛЕР:

Транспортное средство - тягач, оборудованное фронтальным механизмом для подъема, штабелирования или перемещения ИТЕ.

6.11 RO-RO RAMP:

A flat or inclined ramp, usually adjustable, which enables road vehicles to be driven onto or off a ship or a rail wagon.

6.11 РАМПА «РО-РО»

Обычно регулируемая горизонтальная или наклонная рампа, позволяющая автотранспортным средствам заезжать на судно или железнодорожный вагон либо выезжать из них.

6.12 SPREADER:

Adjustable fitting on lifting equipment designed to connect with the upper corner fittings of an

ITU.

Many spreaders have in addition grappler arms that engage the bottom side rails of an ITU.

6.12 СПРЕДЕР:

Регулируемый механизм на подъемном оборудовании, предназначенный для соединения с фитингами верхних углов ИТЕ либо для соединения при помощи механизмов захвата ИТЕ снизу.

Многие спредеры оснащены, кроме того, механизмами захвата нижних продольных балок ИТЕ.

6.13 STRADDLE CARRIER:

A rubber-tyred overhead lifting vehicle for moving or stacking containers on a level reinforced surface.

6.13 СТРЕЛОВОЙ АВТОПОГРУЗЧИК:

Стреловой подъемник на пневмоходу, предназначенный для перемещения или штабелирования контейнеров на горизонтальной укрепленной поверхности.

6.14 TERMINAL:

A place equipped for the transshipment and storage of ITUs.

6.14 ТЕРМИНАЛ:

Место, оборудованное для перевалки и хранения ИТЕ.

6.15 TRACK GAUGE:

The distance between the internal sides of rails on a railway line. It is generally 1.435 m.

Other gauges are generally used in some European countries:

for instance, 1.676 m in Spain and Portugal, 1.524 m in the Russian Federation.

6.15 ШИРИНА ЖЕЛЕЗНОДОРОЖНОЙ КОЛЕИ:

Расстояние между внутренними сторонами рельсов железнодорожного пути. Она обычно составляет 1,435 м.

В некоторых европейских странах имеется другая ширина колец, например 1,676 м в Испании и Португалии, 1,524 м в России.